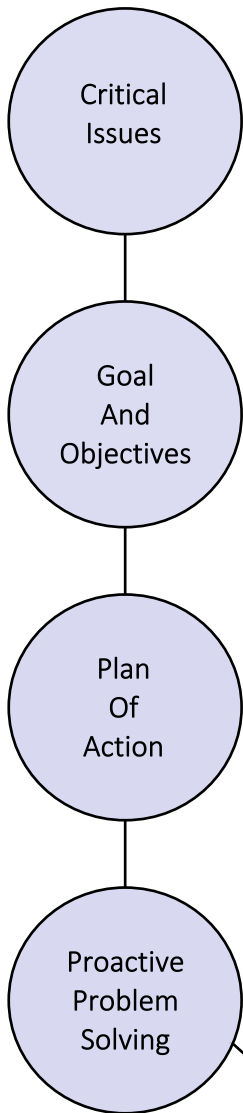


A SHORT COURSE IN STRATEGIC PLANNING



STRATEGIC ACTION IS THE CORE PROCESS OF CREATIVE CULTURES

To succeed at our mission, every level of our organization needs to be fully involved. It stands to reason then, that planning the strategies to fulfill our mission requires a similar, system-wide involvement. Strategic action can become the central core of all our activities. Strategic thinking is accessible to all of us if we just stop to consider what we do on a daily basis. By breaking any simple or complex process down into its logical components, we can learn to describe and navigate the methods that bring about the changes we desire.

STRATEGIC ACTION ON THE FOUR LEVELS OF CREATIVE ENTERPRISE

When we apply this effort on the four levels of our enterprise, each layer contributes its unique experience and expertise to the process. The executive level sketches in the big picture of the driving issues, the desired goals and a general course of action. The administrative level informs us of the scope of work, its timelines and budgetary factors. The production level details specifications and quality information critical to the process. The data level provides the tables and fields of information that permit instructions to be issued and feedback to be collected on our performance. As we roll out our strategy, knowledge of the process flows seamlessly back and forth between our organizational levels to guide the ongoing planning, implementation, evaluation and refinement that helps us adapt to change.

A COMPREHENSIVE VIEW

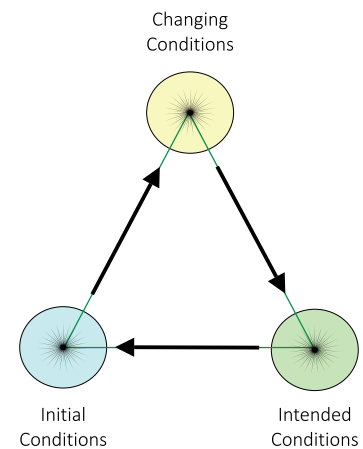
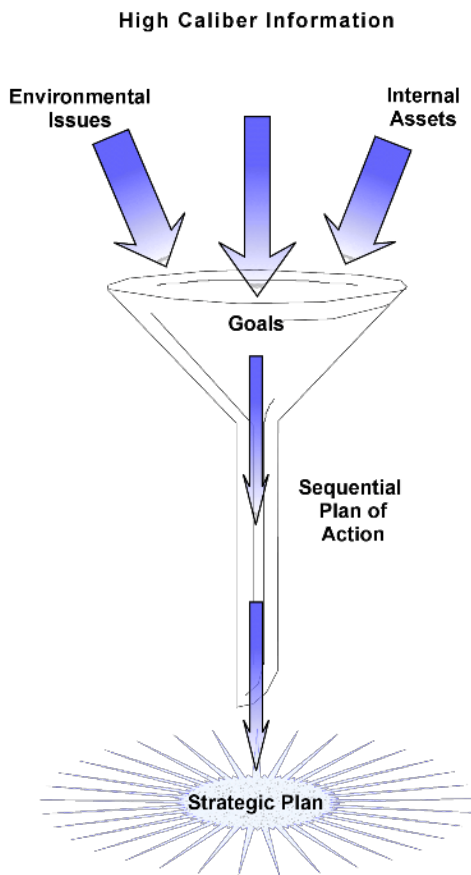
Strategic thought is a comprehensive view of what we intend to do. It helps us understand the inter-related and interdependent nature of our efforts. It describes our understanding of where we are now, where we want to be and how we're going to get there. It reflects our knowledge of the important influence that affect us, the assets at our disposal and our idealized plan to leverage them in response to our pressing issues. On its most abstract level, strategy is how we see the three states of the creative event - our resources, goals and actions. In its formative stage at the executive level, it's appropriate for it to be general and abstract. This allows it to be open and inclusive, able to unite divergent views in consensus. It lets us value and rank variables and optional paths or possibilities. It permits us to classify logical, pigeon holes for more detailed and specific information that may arise at a later date on other levels of the enterprise. These later details of work and resource articulate the means that bring the strategy to completion. Strategy's a big picture that always suggests its finely detailed parts.

As strategy moves beyond the executive tier, it becomes more probable and concrete. With each iteration of the strategic effort on another level, more information is gathered

and the plan becomes increasingly substantial. When strategy moves beyond planning into implementation, our assumptions about how the plan works meet the hard facts of reality. Once we can evaluate our efforts, our strategy becomes about as substantial as it can get. Then, when our effort reaches its conclusion, we know the actual form of our creation and exactly what it took to make it happen.

CREATING THE STRATEGIC FUNNEL

Strategic Planning is a systematic process. We can think of it as a funnel. At the top, we want to pour in high caliber information from every relevant resource. As we progress through the process, ideas are sorted, discarded and refined until we have a focused product that meets our needs. We create this funnel by moving progressively through a series of questions that help identify the many, critical aspects of the plan. Each stage produces a set of building blocks that we use as the foundation for the next stage of questions. As we progress, the clarity and cogency of our argument increase. When we've completed the exercise of strategic thinking, we can have confidence in our plan because we know the territory we've passed through to generate it.



It's important to remember not to jump ahead in the creation of a strategic plan. Focus on just one step at a time. Each phase is as important as the next. If we leap ahead to a later topic without addressing all of the earlier stages, our plan will lack adequate development. In the planning stage, a steady, patient, comprehensive approach yields the greatest rewards. To begin planning a strategy, start by answering these questions. When you've finished with each step, move on to the next, using the answers you've produced as a resource for further planning.

WHERE ARE WE NOW? WHAT IS THE CURRENT STATE OF OUR EVENT?

Whenever we begin a new initiative, we do so in the middle of everything else. Before we take off towards new objectives, we want to be clear on where we currently stand. That means we need to have a realistic understanding of our current position from two viewpoints. The first perspective is to acknowledge the significant issues in the larger environment. The second is to be aware of our own assets and deficits.

Think about the larger environment we must respond to. At this moment, what are the most important issues affecting us? What forces drive them? What trends are currently in place or now arising that will impact our success? When we consider these issues, what critical factors jump out as being most important at this time?

Similarly, we need to evaluate the condition of our internal affairs. What assets do we have at our disposal? What resources are available to implement a strategy? What knowledge and expertise do we have? What human resources are available? What is our

inventory of technology and tools? What facilities do we have? What logistical support is available? What financial resources are on-hand to support our plans? One effective way to explore these issues is to perform a SWOT analysis. With this method we ask ourselves, “What are our strengths? What are our weaknesses? What opportunities lie before us? What are the threats we’re facing?”

We can take a moment to rank or prioritize these issues. Some may need to be addressed immediately, some might wait until later. We look for synergies in the topics. What issues are obviously interdependent? Are there individual or groups of issues that, if solved for, would leverage our current posture into a stronger position?

When we’ve answered these questions, we’ll have a comprehensive picture of what we’re facing. We’ll also know what assets we have to face it. Armed with this insight, we can explore new directions for our efforts.

WHERE DO WE WANT TO BE? WHAT IS THE INTENDED STATE OF OUR EVENT?

By analyzing our current position, we can understand the forces driving our response. Using our assessment of critical issues as a foundation, we can select one issue or a synergistic bundle of issues and ask ourselves, “Where do we want to be? How could we change the current state of things? What is our idealized vision of how things might improve?” If our goals are time sensitive, we can describe what success would look like in two, or five or ten years. Remember, we only describe our goals in view of the specific issues we’ve identified.

There are two principle modifiers that help to clarify the goals we set. The first modifier is the **quality** of our goals. We can think of it as the set of adjectives or descriptors that help us communicate the values of our goals. The second modifier is the **milestone**. Milestones serve two purposes: first, they define stages of accomplishment. They provide stepping stones for our success. We know we’re progressing because these markers measure our advance. Secondly, milestones align our efforts with time. They assure that we make timely advances, guaranteeing momentum by providing an incremental sense of accomplishment and success to carry us forward.

We often call milestones objectives. They’re something we act to achieve. We want them to be well defined so that we can know when we attain them. One of the most popular and efficient models for describing objects uses the acronym **SMART**. As we set milestones or objectives to achieve, we describe them to respond to these criteria: They’re **Specific, Measurable, Achievable, Relevant and Time Based**. These criteria seem self-evident but don’t be fooled by their obvious nature. If our objectives have **SMART** characteristics, they can increase the coherency of our efforts. If they lack these qualities, they can just as easily dissipate our good intentions through wasted efforts.

Specific objective are linked to a rate, number, frequency or percentage. We don’t want to create a fuzzy objective such as “membership will steadily increase.” Instead, let’s make it specific. “Membership will increase by 30 members a year,” or “membership will increase two percent per month.”

When we create specific objectives we do so knowing we can create methods to know if they’re achieved. We can measure whether membership actual grows at the rate we intend. **Measurable** objectives always imply the creation of systems that will verify the achievement of the objective.

Objectives should be useful not ridiculous. It seems obvious they should be **achievable**, but often they're not. To succeed, we must attain what we're aiming for. It may be readily done or we may have to stretch but all objectives have to be do-able to be useful. Strategies aren't intended to be mere dreams. We never set objectives that we can't achieve reach. We never design for failure. We only create strategies to attain our goals.

Objectives must also be **relevant**. They must speak to the goals we've established. Achieving an objective must impact change and improve the position of both this strategic effort and the organization as a whole. Objectives must never waste resources. They should always show that we're gaining on our goals and increasing our creative resources.

Time based objectives simply means we know when they start and when they stop. We have a target for when they must be achieved. Synchronizing our objectives with time puts them on the agenda of achievement. As the clock ticks, objectives can be checked off the timeline. Milestones are achieved, then past and the journey to success can be more accurately guided.

HOW SHOULD WE ACT? WHAT IS THE ACTIVE STATE OF OUR EVENT?

If we've completed these two major phases of our strategic plan, we're well on our way. We know what issues we wish to address and what we intend to achieve. We have a reason for our efforts and a vision of how we'll make things better. Now we must describe how we're going to make those changes. How will we connect the dots between the way it is now and how we want it to be? This is the sphere of activity and transformation. It's the description of the work we have to do to make our dream come true.

Look again at the current plan. For any objective on our list, describe the steps we must take to attain the objective. Describe the individual tasks we must perform to make the change. Align them in their logical sequence. When that's done, go back and look at each step in the plan. Describe the resources required to fulfill that task. Resources are always one of five types: knowledge, people, technology, facilities and logistics, and financial. What resource is required for each task?

At this stage we can also think about the performance of each task and project the time required to complete it. If we have experience with the task, our sense of time will be accurate. If we're unfamiliar with the work, it can only be a projection. This exercise helps to produce increasingly accurate pictures of how long it takes to perform mission-critical activities. When we move into implementation, the activity plan is the part that can be most accurately measured for time and cost providing us with valuable feedback for our ongoing refinement of our efforts.

When we succeed at creating an articulate work model, we'll have a check list for implementing our strategy. Production plans keep us on track and on target. They clarify the path we'll take to success and provide us with checkpoints to verify the quality of our performance and the timeliness of our efforts.

CREATION IS A SERIES OF REPAIRED MISTAKES

When we've completed these three stages of strategic development, we have a well rounded model of what we want to do. If we've created it with high-caliber information

gathered by those who have strong knowledge of the organization and if we've been thorough in our questions and thoughtful in our responses, there's a good chance we have an accurate, workable strategy to guide our efforts towards success.

Our plan, however, is only a plan. We have only created it intellectually and have yet to put it into action. Will it work? As soon as we begin to spend time and resource in implementing these ideas, we'll discover whether we're right or wrong in our assumptions. Although we may be right on target in the planning stage, the world's a pool of chaos and change. Mistakes get made. Accidents happen. Not even the best plans can avoid this.

That makes it worthwhile to stop before we begin and ask, "what's wrong with this picture?" By engaging in some proactive problem solving before we begin, we can model potential problems and project probable solutions. We can create options and alternatives that realign our resources to make our strategy flexible and adaptive.

We've built our strategy from the three states of a creative event: our resources, goals, and activities. Anything that might be wrong with our plan is a false relationship between these three fields - we're using the wrong resource, doing the wrong work, or we're targeting the wrong goal. This means that solutions to any problem are simply a refinement in how we connect our resources, goals or activities. Change the resource, change the work or change the goal and we've created an option in the strategy. By doing so, we increase our chances for success. We also enhance our ability to think strategically and respond adaptively to change.

AN ONGOING EXPERIMENT IN DIRECTING CHANGE

Now we have a strategic plan. Now we can put it into action. Now we discover if we know what we're talking about. If we've succeeded in the planning stage, the stage of implementation that follows will unfold naturally. It's essential that we move into it directly. Plans that aren't implemented are the single biggest failure in strategic planning. Too often, quality planning produces quality plans that end up on the shelf. This is enormously frustrating to those who've worked hard to create them. Enthusiasm, time and money were invested to envision all the interconnected details that produce a cogent, strategic plan. There must be very important reasons to abandon a plan, for if we stop it now, we alienate those who've contributed to its production.

Plans are also typically time sensitive. They're created in response to specific critical issues that are not static. Change continues to stir up flux in the world. If too much time elapses between the creation of our plan and its implementation, our efforts may be misdirected. Timeliness and strategy are directly correlated.

As we implement our plan, we must understand that we're engaging an experiment in creative change. Our plan is a model of what we think is transpiring, what we think we want to change and how we think we can change it. Like everything else, it's an exercise in probability. The combine resource of our creative enterprise must now align with the effort and execute its multi-layered responsibilities in the implementation of the plan.

As we do, on every level of the enterprise we'll be expressing individual acts of change and experiencing individual effects as a result of those actions. These effects may not be directly perceivable by those who caused them. They may show up on someone else's radar. If we have a well crafted data structure, our information systems should reveal all

significant changes whether they're useful or detrimental. Our people, however, are the first-line of response and, for this reason, the same quality of dialog that fueled our creation of the plan must remain engaged throughout the implementation. Everyone's involved in the creation of this new initiative and feedback about its failures and success needs to be constantly updated, shared and circulated to keep the caliber of creative dialog on a high and productive level.

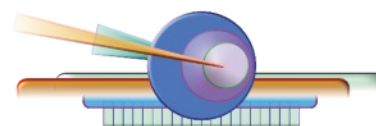
If we achieve this remarkable state of organizational awareness, mistakes won't be swept under the carpet. Failures and shortcomings inherent in any creative effort can be identified, checked and repaired. Ongoing evaluation will reveal what works and what doesn't. The same collaborative insight that generated the strategic plan can now keep it on track. Participatory ownership of the plan assures that everyone shares in its survival and success. Everyone watches, feels, tweaks, and massages the elements to adjust real-time response to change. As it was in the beginning of this effort, solutions may appear from anywhere and when they do, they need to be acknowledged and considered. Creation is a series of repaired mistakes. The critical driver is to make the mistake only once and not repeat it. In this way, the learning curve of the individual and the organization continues to mature towards adaptive, creative mastery.



We know that's happening when the strategy succeeds. As the change we desire ceases to be make-believe and becomes the current state of our affairs, we'll experience a proportional gain in our creative resource. That may be a stronger financial position, an increase in our ability to exert the influences we wish to make; improved self-esteem in our people; a more collaborative and participatory culture; or the emergence of new opportunities. When our strategy succeeds, we produce a more creative, organizational cul-

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Farrell North

Strategic Counsel, Keynote and Facilitation For
Adapting To Critical Change

farnorth@adaptivecounsel.com • 01.303.419.4937