

STRATEGIC PLANNING AS A CYCLE OF LEARNING

I have heard many leaders question the value of strategic planning. They see it as a time consuming undertaking that yields a report that grows mold on the shelf. Here are some keys that make investment in a strategic planning process into an efficient, flexible, ongoing way to improve your organization's quality

A rigorous planning process begins with a disciplined environmental scan. You look outside at customers, suppliers and trends, and inside at employee feedback and financial information. For some of my clients this environmental scan serves a double purpose: the organization enhances its visibility and reputation for quality even as it gathers valuable feedback from meetings with a broad range of stakeholders. Environmental scans may include surveys, data collection, hearing from industry experts and focus groups.

Even the busiest, fastest moving organization needs to take time to articulate a vision ahead. There are two reasons. First, as Peter Drucker says, "if you don't know where you're going, any plan will do." Secondly, you build your leadership team by hashing out and agreeing upon a vision for the next several years. A team-led process insures that everyone is moving in the same direction.

You build the integrity of your organization when you link the master strategic plan to every department's planning, for example, human resource planning. Identify goals that departments and even individual employees can use as a work guide.

One best practice, a "balanced scorecard," lists strategic priorities, the leader or team responsible, benchmarks, stretch targets and steps that will get you there. Benchmarks are to strategic planning what radar and GPS are to navigation. They provide the basis for measuring where you are and where you aim to go. You find benchmarks from comparable organizations and industry standards.

Whether you create a balanced scorecard or some other way of representing a one-year work plan, the goal is to use strategic planning for teaching and communicating. You want to translate the organization's strategy into terms everyone can understand and track. Your work plan sets measurable goals and shows who is accountable.

The biggest single way to make all this planning effective is to monitor and update the plan and evaluate the planning process itself. These are the keys to continuous improvement.

I disagree with Dilbert, who says strategic planning is "like work but without the satisfaction of accomplishing anything." Instead, I'm seeing clients who agree that "the best way to predict the future is to invent it."

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Thanks to our clients and colleagues. Here are some highlights of this year:

- As a VT Council for Quality Assessor, I served on a team that assisted an award winning company in refining its use of the Baldrige Criteria for performance excellence.
- I completed more facilitator training at the International Association of Facilitators' conference in Toronto and advanced human resources training through the American Society for Training and Development.
- It was a pleasure to work collaboratively with clients in all sectors doing strategic planning, communications training, leadership development, conflict management and coaching to improve communication and management systems.

A client writes...

"I want to thank you for the spirit and skills you brought to our retreat... People felt part of a shared planning process and a larger vision."

VT Center for Independent Living