

Strategic Planning to Strategic Doing

It happens often: you develop a strategic plan for departmental or organizational goals, or even for a project or initiative. You come out of the process feeling energized and excited about accomplishing the goals you've set. But a year later you take stock only to discover that your plans were never implemented; somehow your momentum came to a stop after the planning phase. You took care of strategic planning, but what about strategic doing?

To be truly effective, the strategic-planning process should include four phases: explore, focus, align, and execute. We start with the exploration phase.

Typically strategic planning is done by a few people in an organization, and the plan is then handed off to other employees to follow. One problem with this approach is that those who are designated to implement the plan are not involved in creating it. Another is that the leaders who develop the plan are out of the picture when it comes time to implement the plan.

The best planning involves many opinions and perspectives, not just those of company leaders. From the beginning, include front-line employees or those involved in the day-to-day tasks; they will naturally become more engaged in not only the planning phases but in the implementation phase as well.

To gather a variety of employee ideas, consider:

- ▶▶ Conducting focus groups
- ▶▶ Meeting with employees individually
- ▶▶ Administering an anonymous employee survey
- ▶▶ Facilitating organized open-space discussions with large groups of employees (for more information visit http://en.wikipedia.org/wiki/Open-space_meeting)

Be sure to explain to employees why their honest input is valued and what you will do with the information. Including them in the initial planning phases will connect them to the organization's vision, and they will be more likely to carry out the tasks to get it there.

Once you have gathered a variety of ideas in the exploring phase, the next step involves focusing them on a small number of practical but truly transforming initiatives. This starts with determining which strategic initiatives can generate growth and ensure future viability. You should then work through the details of these ideas so you have a clear understanding of what you need to do to achieve each initiative. Some questions to consider include:

- ▶▶ What is your assessment of the external environment?
- ▶▶ How well do you understand your existing customers and markets?
- ▶▶ What is the best way to grow the business profitably, and what are the obstacles to growth?
- ▶▶ Who is the competition?
- ▶▶ Can the business execute strategy?
- ▶▶ Are the short- and long-term goals balanced?
- ▶▶ What are the important milestones for executing the plan?
- ▶▶ What are the critical issues facing the business?
- ▶▶ How will the business make money on a sustainable basis?

Once you've further defined each initiative, you should begin aligning necessary resources, setting some milestones, and drafting an operational action plan designating who does what in what timeframe. Strategic plans are fundamental, directional, and future-oriented. Operational

plans, on the other hand, primarily affect the day-to-day implementation of strategic plans. While strategic plans always have long-term implications, operational plans tend to have shorter-term implications.

With this step completed you'll move into execution. Execution is about cascading your objectives into the performance goals of each manager, supervisor, and employee. This step requires great finesse. Often managers need training to define goals and objectives, provide coaching and feedback, and conduct performance evaluations. Additionally, your employees will need regular communication throughout this stage.

Finally, it is critical to define guidelines for measurement of success. Be sure to periodically evaluate how you are progressing toward your short- and long-term goals and make adjustments to your plan as necessary.