The best ways to shift from strategic planning to strategic doing.

By Colleen M. Niese, SPHR

from HERE to THERE

It's quite satisfying to gather all key players from across the organization around the conference table to talk about completing strategies for the upcoming year. People become energized by envisioning how the company will function differently, clients and customers will be retained, and new business targets will be met. Employee engagement goes up, with productivity following suit.

The trick is to recognize that the real work begins after the last flip chart of the session is approved and all involved (both in and outside the boardroom) have to now shift from planning to doing. For however many months the plan dictates. And do their "real" jobs simultaneously. And implement the associated deliverables. And drive change borne of those deliverables. It's these challenges that lie between the intersection of planning and doing that will either make or break your plan.

So. How does any organization best ensure its hard work during the planning session pays off in the subsequent months during the execution phase? I have learned a few things in my many years of facilitating strategic planning sessions for parking and transportation organizations of all shapes and sizes, from those that are emerging in the marketplace to those that are quite mature, in both the public and private sector. Here are some of my lessons learned, practical insights, and best practices to help anyone interested in strategic planning—whether you're planning your very first session or are on the other side evaluating what's already been decided in the current cycle.

Prep Participants as Much as Possible

When I first started facilitating strategic planning sessions, I asked participants/clients to set aside at least a day and a half, or sometimes two, depending on such variables as the agenda, number of participants, and the organization's experience in the strategic planning space. Those days are long gone for two reasons: 1) most organizations can't afford to take senior leadership completely offline for that length of time, and 2) if you set a meeting time, no matter if the agenda warrants the length, people will fill it with conversation regardless. Now I recommend no less than six hours, no more than eight. The length of time alone underscores a sense of urgency from start to finish, requiring folks to make decisions, stay on point, and minimize death by debate.

To get the most out of however many hours are set, prepare your participants to the best extent possible for success. You can start this process with a survey that asks the attendees to:

- Gauge their level of understanding and comfort in participating.
- Define their expectations for the session.
- Prioritize what they believe are the top organizational goals that need to be completed.
- Ask any questions regarding the process itself.

When the results are collected, set aside a one-hour team prep meeting that is completely dedicated to discussing the session. Start with the end game—setting the organization's strategic plan—followed by the path (the agenda) you will all follow to get there, using the insights collected from the survey and addressing all questions. Be as specific as possible when describing the end state (the goals, their purpose, their importance) and who is to do what to help achieve it.

If there are articles you wish the attendees to review, or pre-session exercises for them to complete, send them out a couple of weeks ahead of time with a few reminders leading up to the day so everyone has plenty of time to complete and think about what they're being asked to do.

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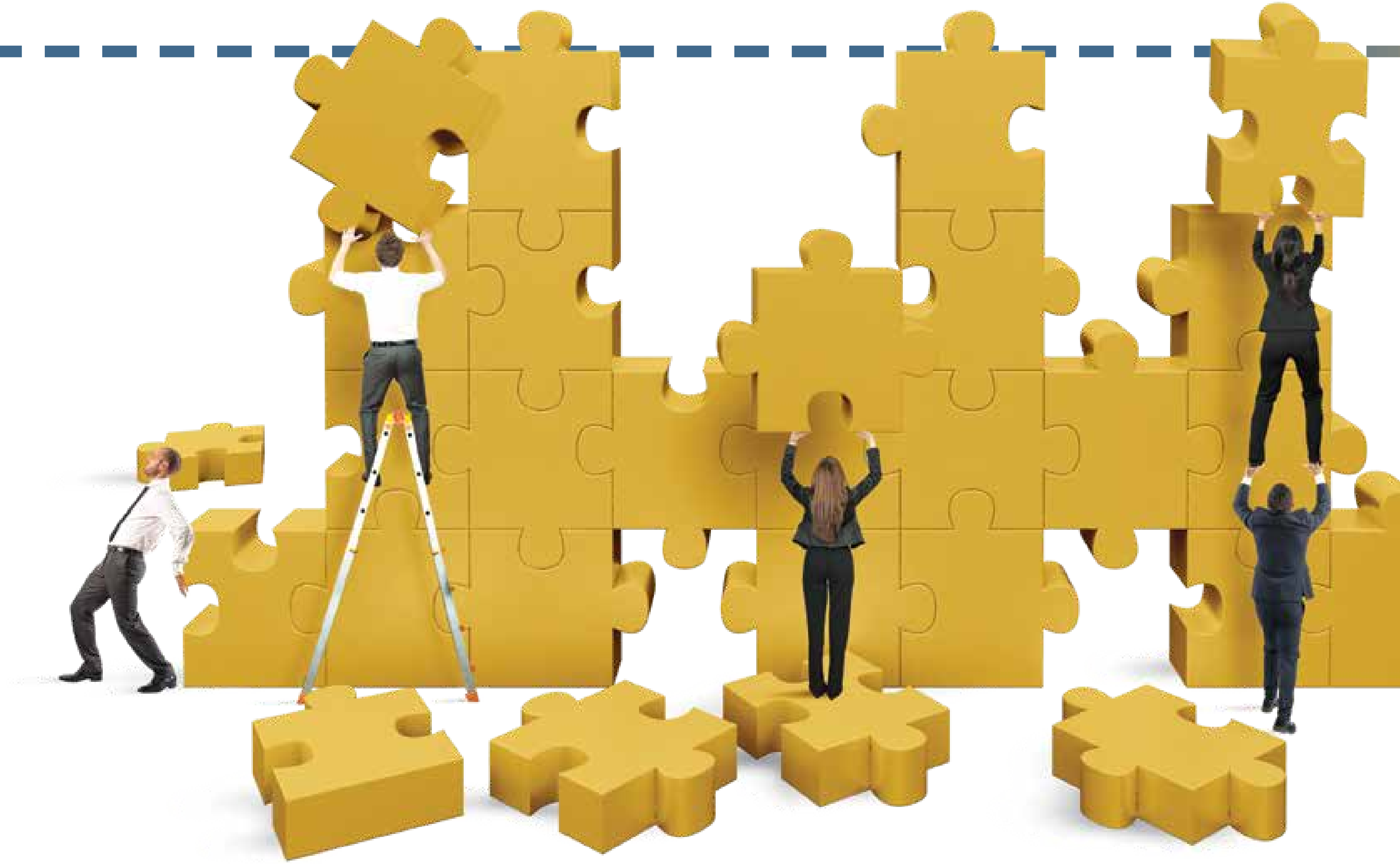

Lastly, include a CEO communique that clearly outlines the value everyone will gain from participating in the session, what expectations of the day he or she has for each participant—including the CEO. This should encourage participants to ask questions, raise concerns, and provide feedback regarding their own desires of what should be accomplished prior to the session. While all may not be aligned on what the final strategies will look like when walking into the session, they should be aligned on how they will define those goals from a process perspective and what each should be doing to get there.

Every year, I work with at least one client team that will complete its first strategic planning session. I can share from experience that the planning phase is fairly low on participation in terms of back-and-forth dialogue, and not many questions are asked leading into the day. I've concluded many times over that this is the "hearing about versus actually experiencing it" dynamic at play. I assure all concerned that once we kick off the agenda, a lot of what's been discussed during the prep phrase will start to click. Then, the engagement, along with the conversation, will go up both in volume and quality.

The other piece to the prep phase is the plan model itself. Plan models come in all sorts of varieties: triangles, pyramids, circles, etc. Some put the customer at the top, others the employees, and still others the financial target, all of which have been developed by really smart people in their respective fields.

Honestly, I have yet to either find or design the one model that fits all organizations. Instead, what I've concluded is that the model that best supports the organization's foreseeable direction and is reflective of culture is the easiest one to use. Therefore, I have modified my own model for every client I have worked with. With that said, all versions commonly include:

- A direct tie to the company's overarching financial objective.
- A correlation between how to drive profit through customer acquisition and retention and realize efficiency through organizational infrastructure and improved process.
- A foundation that is largely comprised of customers, employees, and technology.
- Supporting logistics for each strategy: who owns it, who is served by it—customer, employee, ownership—and whether it will make money, save money, or both.

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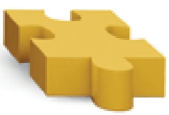
In setting a small list of two to three strategic goals, it's highly likely that one to all three will be accomplished with excellence on the other side of the session. However, if the list is long with, say, 11 to 20 goals, it is almost a certainty that none will be met by the day's end.



Time to Plan

Everyone's gathered, introductions have been made, the CEO has said some wise, inspired words. Now it's time to turn the page and get about the business of building the plan. If you've participated in these sessions, you know this is the official jumping-off point for the team and that moving from general orientation into laser-sharp conversations is the first hurdle to clear.

At this point I like to facilitate an introductory exercise that gets the collective heads into the strategic planning space. Depending on the team dynamics, I'll conduct either a visioning exercise in which the participants mentally picture their future state, a word association in which they define for themselves future success using descriptors, or a pictorial process in which they select images I have scattered across the table that best represent what they want the organization's future to look like.

Like the model, one exercise is not better than the other. What's more important is ensuring people have pivoted their thinking from what's waiting for them on the other side of the door to what they need to accomplish by participating in the session. I find it hugely helpful for team members to talk with each other about what the future looks like in successful terms and then connect that with the day's agenda in terms of how they'll get there.

Now that it's time to actually begin building the plan, there are many paths teams can follow. S.W.O.T. (strengths, weaknesses, opportunities, threats) analysis is a common approach; so is examining the financial budget and discussing what needs to be done to achieve targets, or honestly assessing the accomplishments and disappointments with the past plan to identify what's working, what's not, and why, and carry those lessons into the current year's planning. The mechanics of identifying strategies is as important as the following guiding principles:

- **Less is more.** As Sean Covey notes in the "The 4 Disciplines of Execution," in setting a small list of two to three strategic goals, it's highly likely that one to all three will be accomplished with excellence on the other side of the session. However, if the list is long with, say, 11 to 20 goals, it is almost a certainty that none will be met by the day's end.

  Early in my career I was part of a strategic planning group that set 12 (!) goals for a session, and I can still remember the first 20 minutes of every check-in meeting starting with reminding ourselves of what the heck the goals were before we could discuss status. You can guess how many we accomplished that year. I always recommend no more than three per year for the above and so many other reasons. But, at the top of the list is that success must be achieved to drive sustainability and future years' momentum.
- **What and how.** The best strategic plans contemplate both the what (the plan) and the how (who). I often share that I've seen better results from a high-performing team that created a B+ plan than from an A+ plan managed by a highly dysfunctional team. All teams have their own unique set of strengths and weaknesses. Those that are honest about their interpersonal relationships, capitalize on where they swim in the same lanes, address gaps (trust tends to be a common struggle), and work on improving team effectiveness just as hard as the plan itself

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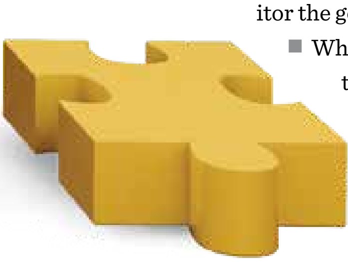
will undoubtedly have better success with the results and leverage all that's gained from improved working relationships.

- **Common goals are paramount.** I recently had the pleasure of working with more than 100 representatives from various geographic regions across the United States for a day at a professional association's annual conference, facilitating each group's 2018 strategic imperative plan. I gained a different sense of value when it comes to purpose of common goals that day. Each participant represented a different community, and those tables whose members figured out the one common goal that could serve each community (as opposed to agreeing each community would do its own thing) built a much richer plan and had complete buy-in from all. Before they walked out the door, they also had agreed how to best leverage each other's resources to speed up the goal's development and set a target launch date that was a full three months ahead of all the other groups. This experience so easily translates into the corporate environment and can be best illustrated when it comes time to evaluate each goal.

When the goals are set in final draft form, it's typically the point of the day that energy is high and the team senses with this major accomplishment that the agenda is going to start winding down. I suppose I'm a bit of wet blanket by reminding the group it's time to evaluate each goal to make sure strategies are aligned with key drivers that were agreed upon at the start of the day.

For each goal, we walk through an exercise that asks the group to answer questions:

- What roles are needed to develop, execute, and monitor the goal's deliverables?
- Which stakeholder groups will benefit from the deliverable?
- What departmental budgets will contribute to its development and ongoing management?



Visually, it becomes quite evident in a very short period of time which goals are common and which are individual. As you can imagine, the longer the lists of answers for each question, the more likely the goal is serving most, if not all, of the needs from the perspective of owner, customer, and employee.

Time to Implement

This is also the point where the planning really shifts into doing. I encourage all around the table to truly challenge each other as to who is going to do what from this point of conception all the way through steady state metrics reporting and every step between. And as we're putting names to these various pieces, we're also having a very honest conversation regarding commitment and accountability, along with whatever the team has agreed to, in terms of the supporting ground rules they'll use going forward. To hold each other into account, I'll document this and circulate the information post-session and include it as part of every month's check-in meeting's agenda.

Albert Einstein is reported to have said that if he only had one hour to solve a problem, he would spend 55 minutes defining the problem and the remaining five minutes solving it routinely. I like this quote when thinking about what happens next with the team after it has finalized the plan, communicated throughout the organization, and started with the business of doing it. For those folks who have spent their session being thoughtful about the business, authentic with their strengths and weaknesses, and mindful of all stakeholders' concerns with the crafting the plan, the relative effort in executing does in fact play out to be the less-demanding part of the equation. P

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