Strategic
Communications

Success Through Strategy

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70 TIPS FOR THE "7 STEPS OF STRATEGIC PLANNING"

STEP 1: FORMING THE TEAM

1. Make sure the project leader is the person with the most to gain—or lose—from a successful outcome and the person who truly "owns" the process.

2. If the logical project leader lacks strong leadership/communication skills assign a co-leader to fill that role; but be sure the "natural leader" is a champion for the successful outcome of the process.

3. Never assign the task of facilitator to the team leader. The facilitator should be a non-biased individual who has no stake in any aspect of the outcome of the process (other than its successful conclusion).

4. Team members should be willing participants with full support of their involvement from their supervisor/manager.

5. Take advantage of "volunteer" team members, even if they may not have a natural role in the project or process. Every team can use willing, enthusiastic members.

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6. Include your detractors! Better to give them a voice in the process along the way then have them throw stones and threaten the implementation of the plan later.

7. Extend the ability to participate in the plan by using ad hoc members and/or sub-committees and teams at various points along the way.

8. Keep team members engaged through ongoing communication and openness to new ideas and differing opinions.

9. Include a team member who can facilitate the administrative aspects of the process—arranging meetings, keeping minutes, etc.

10. Spend time up front focusing on the social aspects of team development through opportunities for the team to "get to know each other."

STEP 2: FACILITATING

1. Establish a standing meeting day, time, length and place to help minimize conflicts. Make regular participation a requirement and hold members accountable for their participation.

2. Create ground rules at the outset to clarify expectations explicitly—give all team members permission to hold each other accountable to these ground rules throughout the process.

3. Recognize the stages of team formation—forming, storming, norming and performing—and manage each phase appropriately.

4. When membership changes occurs (and they will) go through the "get to know each other" social process again to assimilate the new member into the team.

5. To manage the impact of team members who attempt to dominate the discussion, use these techniques:
    - For certain topics you might give the group a bit of time to think about their input/response - ask them to "jot down" their thoughts and then call on them in a roundtable format.
    - Consider establishing a time limit on comments for certain discussions. This is done at board meetings, public hearings, etc., sometimes to ensure that everybody will have a chance to speak.

- If the person dominating the discussion tends to repeat the same points over and over again in an attempt to assert influence over the group, write the point down on a flipchart to visually illustrate that you "got it" and it's now time to move on.
- Divide the larger group into smaller groups for specific discussions. Assign each group a facilitator whose role involves not contributing to the discussion, but managing the conversation and taking notes. Assign the dominating individual to this role.
- Talk to the dominating person outside of the meeting—indicate that you appreciate his/her input but that you're concerned that less vocal or more introverted members won't feel as comfortable sharing their thoughts. Ask for the person's ideas on how to best handle this—thank them for any efforts they might make to pave the way for others to have more input.

6. Play "devil's advocate" from time to time, encouraging the team to consider both the pros and cons of the ideas they're generated.

7. Remain flexible and alert to team dynamics. Monitoring and managing the "mood" of the group is an important role of the facilitator.

8. Manage conflict openly and immediately. Use facilitation tools like the "fishbowl" to ensure that all sides of an issue are "heard."

9. Model desired behaviors and actions through your own behaviors and actions.

10. Make time for fun and celebration at milestone points in the planning process.

STEP 3: GATHERING INFORMATION

1. Determine, at the outset, what questions you need answered and develop a list of data and sources that you can use as a guide for future strategic planning sessions.

2. Make decisions about information to gather based on "need to know" vs. "nice to know" and the value of the information in terms of how it will be used and the cost (time and money) of attaining the information.

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3. Start somewhere—there are no “perfect answers” in terms of the information you will need. Put a stake in the ground and learn as you move forward. You can always add/adjust later.

4. Don’t overlook the wealth of information that you have readily available to you through your own sales and customer data. Sometimes you have information on hand that might answer questions you would ask in a survey. For instance, sales data by product can give you an indication of preference/demand in terms of what customers actually *have* done, versus what they might tell you through a survey that they *might* do.

5. Focus groups can be useful to generate qualitative information but be cautious about using the results of focus groups to make key decisions since the data is too limited to be statistically valid.

6. When doing surveys, don’t ask questions you already know the answer to. For instance, if you know your service call response call is too long, don’t ask customers if they think your service call response time is too long.

7. The Internet has a wealth of secondary data that can be very useful, but beware of data gathered through .com or .org sites. Err, instead, on gathering data through .edu or .gov sites.

8. Take advantage of information that may be available through trade and professional associations you’re involved with. Their research related to your industry can be a very cost-effective source of valid, secondary data.

9. When considering whether to conduct primary research or rely on secondary research that may be available, do a cost justification analysis. The more risky the decision being made (in terms of cost outlay or revenue potential), the more valuable primary research may be.

10. Defining and documenting a process for conducting the situation analysis can save time for subsequent planning sessions.

STEP 4: REVIEWING MISSION, VISION AND VALUES

1. While few would say that they enjoy the prospect of reviewing and affirming their mission, vision and values statements, this is a critical step in the strategic planning process.

2. Your organization's mission, vision and values statements provide a foundation for evaluating the appropriateness of the elements of your strategic plan.

3. Whether or not you have written, documented mission, vision or values statements, they do exist.

4. Your mission statement should answer three questions: what do we do, how do we do it and who do we do it for? Starbucks' mission statement is: "To inspire and nurture the human spirit—one person, one cup, and one neighborhood at a time."

5. Vision statements represent far-reaching statements that provide an indication of what the company hopes to be or achieve over the long term. State Farm's vision statement is: "…to be the customer's first and best choice in the products and services we provide."

6. Value statements should serve as guiding principles for your business, explicitly defining the things that you do—and don't—stand for.

7. If values statements are not rooted in reality, they do not express true values. Values must be explicit and all organization members must be held accountable for "living" the values.

8. Agreement and consensus on the mission, vision and values should focus on how accurately these statements reflect reality and not so much on the specific word choices made. Focus on intent, not expression.

9. To test the validity of your mission, vision and values statements ask employees: "What do we do, who do we serve and what do we stand for?" See how closely what they say matches the stated mission, vision and values align with what they say.

10. If a strategic planning goal, objective strategy or tactics fails to reflect your organization's stated mission, vision or values it should be discarded—or your stated MVV should be restated.

STEP 5: CONDUCTING THE SWOT

1. Conducting a formal SWOT analysis helps your organization consider and synthesize the multiple inputs into the strategic planning process.

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2. There are no “right or wrong” SWOT analysis responses. Gather all inputs—the analysis and prioritization process will serve to weed out those that are invalid or irrelevant.

3. The SWOT analysis should be run like a brainstorming session and can deteriorate quickly if participants begin critiquing the inputs as they are offered. Accept any and all inputs.

4. If you can afford it, consider a skilled outsider to serve as your SWOT facilitator (even if you’re not using a facilitator for the rest of your strategic planning efforts). Using a non-biased third party can help to avoid blind spots and GroupThink.

5. When capturing inputs, make sure they accurately reflect the spirit and intent of the comment.

6. Consider extending input into the SWOT analysis process by involving the entire organization in “voting” on top priority items. Computer-based survey tools (like SurveyMonkey or Zoomerang) can be used to calculate results automatically.

7. Using a process like the nominal group technique can help to prioritize the inputs to the SWOT analysis in a democratic way.

8. Once priorities have been established based on “majority rule” they should be considered “carved in stone” for this round of strategic planning—resist attempts by individuals to lobby for personal preferences that were not reflected through the group process.

9. Strategies build upon the SWOT analysis by indicating how the organization will leverage strengths and opportunities and/or overcome weaknesses and threats.

10. Document the results of the SWOT analysis as an input into the next round of strategic planning.

STEP 6: CREATING YOUR GOST

1. Many people have strong and conflicting opinions about the “correct” definitions of the terms “goals,” “objectives,” “strategies” and “tactics.” Don’t waste time during your strategic planning process arguing about the definitions. Create the definitions you wish your group to use, document them and move on.

2. Regardless of how the terms are defined, there should be clear alignment from goals through tactics. Goals set the broad direction, objectives provide clarification around the broad goals, strategies indicate “how” objectives will be met and tactics provide the specific direction or action plans for achieving the goals.

3. Goals should be aligned with the MVV, long-term, realistic, few and agreed upon.

4. “I want to lose weight” is a goal. “I want to lose 15 pounds by June 1” is an objective.

5. Objectives should be SMART: specific, measurable, actionable, relevant (to goals) and time-bound.

6. Process objectives indicate what you are doing and how you will do it—outcome objectives identify specific outcomes or results.

7. Developing strategies involves considering all of the things you have going for and against you, deciding where you hope to go and then coming up with ideas for how to get there.

8. Using a rating process of some sort can help to prioritize and possibly even eliminate strategies based on criteria such as “odds of success,” “required resources,” “level of risk” and “level of organizational support.”

9. Tactics represent the “to do’s” of the strategic plan and indicate how the strategies will be accomplished—they should not create *new* strategies, but should support those that have been identified as part of the process.

10. When identifying or approving tactics you should select those things that are most likely to support your strategies with the least amount of time, effort and cost.

STEP 7: IMPLEMENTING THE PLAN

1. Strategic planning isn’t really about *planning*—it’s about *executing* the plan. A plan is meaningless unless it is implemented.

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2. Assign clear accountability for accomplishment of specific plan objectives and tactics to *individuals* not groups. When “everyone” is accountable, “no one” is accountable.

3. Don’t wait until your strategic plan is complete and ready to implement before developing your communication plan. Begin planning for communication early in the process, and communicate regularly, so you can hit the ground running once the plan is complete.

4. Communication about the purpose of the plan, the process of creating it and its final format should be ongoing with all key stakeholders—internal and external to the organization. The strategic plan should not be a “secret document” shared only with a few, but a roadmap used by all to achieve identified goals.

5. Use multiple tools, in multiple ways and at multiple times to ensure that the plan is broadly understood and becomes a guiding force for the organization’s activities.

6. Align elements of the plan into the day-to-day operations of the organization by assigning plan responsibilities to employees and including those assignments in work plans and existing performance evaluation processes.

7. Keep the plan “alive” by using it as the basis for meeting agendas at every level of the organization. This is a good way to continually reinforce that the plan is directly the activities of the organization and is not just a writing exercise.

8. Have regularly established report-outs on plan progress.

9. Incorporate a feedback loop to receive feedback about the content of the plan and recommendations for future plans. The planning process should be iterative, each subsequent plan building upon what has been learned from the former plan.

10. Recognize that a strategic plan is never “done.” The plan should be a “living” document that provide ongoing direction and focus for the organization.

The Complete Idiot’s Guide to Strategic Planning is your “personal consultant” for creating and executing a successful strategic plan.

Need help? Let us know. linda@stratcommunications.com