

Our Strategic Planning And Business Intelligence Increase Organizational Success, Individual Performance and Alignment

Should You Do Strategic Planning?

The best way to predict the future is to invent it.
Alan Kay, Apple Computer

Strategic planning offers great potential to help organizations and departments not just to survive but to thrive, manage change, raise the bar for performance, productivity and profitability, to reinvent themselves to keep pace with changing technologies and conditions.

However, many organizations' strategic planning efforts fail or fall far short of their potential. Sometimes they write excellent plans but fail to fully implement them,. Sometimes the plans themselves are seriously flawed, shortsighted or limiting.

What Is Strategic Planning?

It's essential to define strategic planning not as a one-time event but rather as ongoing *organizational learning*, involving four specific tasks:

1. Taking stock of organizational performance. Strengths, weaknesses, opportunities, threats. Effective Taking Stock requires valid data, Business Intelligence surveys and interviews of clients, stakeholders, unsuccessful proposals, employees and leadership.
2. Updating and clarifying the organization's Vision, Mission, Values and Goals, a balanced scorecard for long-term success.
3. Developing and implementing specific initiatives to address and implement business goals and objectives.
4. Working at implementing the plan at every level in the organization from senior managers through front-line employees.

Outcomes, Benefits

Effective strategic planning results in specific, tangible outcomes:

- Increased customer, client and stakeholder satisfaction
- More complete, accurate assessment of the organization's performance, productivity, strengths, opportunities and areas for improvement
- Updated, clarified department Vision, Mission, Values and Goals
- Increased *alignment* between individual effort and department goals
- Reduced conflict, improved working relationships with other departments
- Improved focus and clarity throughout the organization
- Increased customer, client and stakeholder satisfaction, increased repeat business
- Improved morale at all levels of the organization

Recurring Problems

While strategic planning has great potential, organizations make recurring mistakes that limit the effectiveness of their strategic planning:

1. Limited data. Without accurate client, stakeholder and employee data, planning can be unrealistic and misguided.
2. Ineffective Vision, Mission, Values, Goals. Sometimes organizations fail to develop goals that develop their full potential.
3. Limited management buy-in. Sometimes a few senior managers develop the plan and fail to fully engage all of the senior team.
4. Limited employee buy-in. Often, managers who develop the plan fail to fully engage employees at all levels in implementing it.
5. Use of one-time retreat as primary planning mechanism. Onetime retreats provide excellent starting points but require regular, formal follow-through to ensure lasting results.

The flawed planning we have seen has either emphasized strategy while neglecting people concerns or focused on people issues while neglecting more strategic thinking.

Our Approach Ensures Success

Our approach to strategic planning consistently generates positive results because we:

- Organize strategic planning as a series of several workshops instead of a one-time event to ensure follow-through and full implementation
- Develop, conduct and analyze highly effective surveys and interviews of clients, stakeholders, unsuccessful proposals, employees and leadership
- Work extensively with employees and managers at all levels of the organization to ensure full buy-in and implementation.
- Help the organization develop Vision, Mission, Values and Goals that fully develop the organization's potential and *invent its future*.
- Approach the work as ongoing organizational learning rather than as a one-time meeting
- Provide leadership training in the organization and/ or externally in our Leaders Circle program to provide leaders with essential insight, skills and tools

Our Experience Provides Perspective, Support And Challenge

We have worked extensively and successfully with strategic planning in a broad range of applications:

- Architecture firms, engineering firms and construction companies
- Software, technology and research organizations
- Departments in large organizations, e.g. in hospitals, universities and government
- Non-profit organizations
- Board of Directors

We regularly teach seminars on strategic planning for Northeastern University and the Harvard Graduate School of Design. We wrote the Report on *Strategic Planning for the 2005 Update to the Practice Manual* of the American Institute of Architects.