



## Strategic Planning

*Strategies 4 Impact!* specializes in facilitating strategic planning for businesses, associations - for organizations of all shapes and sizes. Principal Brian Watkinson has over 25 years experience leading strategic planning and supporting the translation of *strategy* into action – action that has a positive and constructive *impact* on the organization and its success ...  
*Strategies 4 Impact!*

### What is Strategic Planning?

Strategic planning is a structured process in which the leadership of an organization thinks carefully about the “big picture”, about things like:

- What does the organization look like today? What are its strengths? Its weaknesses?
- What is its audience or market now?
- What is happening in that audience that should lead to changes in this organization, what it does, and how it does what it does?
- Is there a new market or audience emerging, and what does that mean for the organization?
- Are there things happening around it that will create new opportunities? New challenges?
- Where does the leadership think the organization should be going? What does it have to do to get there? How will it know when it succeeds?
- What should the organization look like in the future? What does it need to be doing? For whom? How does it need to be doing that?

Strictly-speaking, Strategic Planning is not about tactics and implementation, although the most powerful Strategic Plan will never achieve its potential if the tactical planning essential to putting it into action is not well executed.

And that happens all too often – and is the reason why *Strategies 4 Impact!* also helps its clients translate their strategy into action.

Most organizations adopt a “planning cycle”, often 3 – 4 years. It is usually unrealistic to attempt to plan any further out than that. At the same time this cycle provides ample time to develop and execute the tactical planning necessary to implement the Strategic Plan. Creating the Strategic Plan involves the organization’s leadership - often a Board of Directors - and the management team, and most often occurs during an event – a Retreat - that is held for the sole purpose of planning.

Many groups also schedule an “annual checkup” on their Strategic Plan and its implementation. Is it proceeding on schedule? Are the necessary leadership and resources being consistently committed for success?

And, *very importantly*, have circumstances changed, necessitating some revisions to the Strategic Plan?

*Strategies 4 Impact!* Principal Brian Watkinson is an architect by profession. He often likens strategic planning to the design process an architect and its team uses to design a building. If yours is a business, for example, Brian will say *"Design YOUR business for success ... and profit!"*

## **What does a Strategic Plan look like?**

There are lots of different models for Strategic Plans. The model *Strategies 4 Impact!* works from is goal-focused, and typically includes:

- Vision Statement – what the “future state” of the organization will look like ... *“By 2016 WestJet will be one of the five most successful international airlines in the world providing guests with a friendly and caring experience that will change air travel forever.”*
- Mission Statement – what the organization will focus on doing ... *“Aecon – Building Things That Matter”*
- Values Statement – those over-arching ethical principles that will guide the organization all day, every day and in everything it does ... *principles like responsibility, accountability, professionalism, integrity, commitment*
- Operating philosophy – the rules of engagement for the leadership and for those it leads, describing how the organization will behave ... *things like exceeding expectations, consistently delivering value, innovating, excellence in communication, outstanding cost effectiveness, embracing change*
- Strategic Goals – those specific goals and objectives that will lead to successfully fulfilling the Vision and Mission ... each planning cycle typically identifies 4 to 6 broad strategic goals on which the organization will focus its precious energy and resources – *goals like “become the market leader”*; each broad goal can have a number of “sub-goals” or objectives – stepping stones to achieving the broad goal – *perhaps “deploy new technology to improve customer service”*
- Critical Success Factors – the metrics that identify how the organization knows it has achieved its goals and furthered its mission - *“our sales exceed those of any of our competitors”*



Then again, *every organization is different*. *Strategies 4 Impact!* doesn't impose a *formula* on its clients but *adapts* this model to meet their specific, individual needs and objectives, ensuring highest value results from the process.

## **Why do Strategic Planning? What are the benefits?**

Strategic Planning is *critical* for every organization that wants to *excel* at doing what it does.

Whether it's a business that wants to earn the most profit that it can and be best in its class; an association serving and representing its members' interests; or, a non-profit group that intends to deliver highest quality community and social services to its clients, every organization has to plan effectively in order to *succeed*.

A solid Strategic Plan *defines* and *shapes* the organization.

It defines the *vision* ... the '*future state*' for the enterprise. What it will look like and what it will be doing in the future.

The Strategic Plan helps the organization *maintain* its *focus* and *direction* – and in business, its *competitive edge*.

It provides the framework for and informs *every decision* and *every action*, *every hour of every day*.

The Strategic Plan makes certain that precious human, financial and technical *resources* are *targeted* on that '*future state*'.

It helps ensure that the organization consistently delivers *greatest value* for its clients and customers, whatever the nature and purpose of its activities may be.

The Strategic Plan is the "*score*" used by the leadership to "*conduct the orchestra*". And it is essential in helping each of the "*musicians*" in that orchestra play their part in concert with the others.

Not only does it lead to *success* for the organization, it also contributes to the *personal and professional fulfillment* of those that lead and work in it.

And, a Strategic Plan is instrumental in "*telling the world*" about the organization, and what it does so well. It drives communications strategies, defines the messaging, identifies the media that will yield the greatest return on investment, and, in a commercial setting, frames the business development strategy.

## How does Strategic Planning work?

Most organizations engage a professional facilitator like *Strategies 4 Impact!* to guide them through the process.

As an outsider, a good facilitator brings a fresh perspective and challenges participants to “think outside of the box”. An experienced facilitator will first encourage “blue sky” creative brainstorming and the “lateral thinking” that is critical to successful Strategic Planning, and then will work to build consensus and guide the planners to *specific, clearly-stated conclusions that are objective, realistic and achievable.*

Here’s a look at the process *Strategies 4 Impact!* typically uses when facilitating Strategic Planning.

It centres around an off-site Strategic Planning Retreat, and includes:

- extensive preparation by *Strategies 4 Impact!* in the months before the Retreat in order to maximize return on investment of participants’ time and energy
- *Strategies 4 Impact!* facilitating the Retreat itself, and
- *Strategies 4 Impact!* guiding and supporting the critically-important follow-up which will ultimately determine the success of the whole Strategic Planning process

Again, *every one of our clients is different*, and *Strategies 4 Impact!* modifies its approach to get the best results and provide the highest value on each assignment.

### Phase 1 – Research and Synthesis

To make the most of the investment that participants will make in the Strategic Planning process and to lead to the most successful outcome, *Strategies 4 Impact!* will:

- a. spend time with *individuals* in leadership/management, as well as the *leadership team* as a whole, to better understand the organization, what it does, its audience or market, its current strategies and objectives
- b. carry out independent research to help prepare for successful Strategic Planning – this could include things like
  - market research
  - a situational scan to identify broad forces and trends that may affect the organization and its planning – for example: population demographics, the economy, government policy, globalization, social responsibility, climate change (*For businesses and other organizations in the design and construction sector, Strategies 4 Impact! Principal Brian Watkinson brings*

*added value based on his experience leading his successful architectural practice and then as executive director of the Ontario Association of Architects. He continues to 'look over the horizon' at the many trends and factors that will impact that industry into the future, and shares those unique insights with clients to support their strategic planning efforts.)*

- interviews with clients and surveys of other key stakeholders - for example, contractors and project managers that a design practice has worked with, or families of clients served by a non-profit association (*This has proven to be an invaluable service which has never failed to shed new light on outside perceptions of the organization.*)
- c. synthesize the results of the research in a draft report
- d. review and validate the draft with leadership/management
- e. prepare a final report, incorporating the feedback from leadership/management, that will provide background for participants in the Strategic Planning Retreat

The research and synthesis typically takes place during the 2-3 weeks prior to the Retreat.

## **Phase 2 - The Strategic Planning Retreat**

As touched on earlier, there is a lot of talent and time invested in this Retreat, so it is imperative to make the most of that investment. *Strategies 4 Impact!* achieves that through careful preparation before the Retreat, and expert facilitation during it.

Experience shows that it's important to hold the Retreat offsite to avoid disruption and encourage participants to focus on their strategic work. The model recommended by *Strategies 4 Impact!* is designed to help participants shift their thinking from their day-to-day responsibilities to focus on Strategic Planning for the organization.

*Strategies 4 Impact!* will:

- a. Prepare background material for participants to review in preparation for the Retreat. This will include the research report from Phase 1, as well as additional information about the Retreat format and its objectives.
- b. Lead and facilitate the retreat. *Strategies 4 Impact!* recommends a retreat that extends over three consecutive days, although the format can vary depending on the specific needs of the client.

The agenda for the Retreat typically looks something like this:

### *Day One*

Day One usually starts midday or mid-afternoon. We work into the evening and end by 9 pm at the latest. This gives participants time to shift from the day-to-day

to the strategic, and at the same time ensures some tangible, early results by the end of Day One. Activities on Day One can include:

- Working Lunch (plenary session)
- Welcome, introduction
- Review of the Game Plan for the Retreat and its Objectives
- Watkinson presents an overview of key material contained in the pre-Retreat briefing package and facilitates discussion of that material - this often includes:
  - results of market research
  - overview of trends that will affect the organization and the planning process
  - results of stakeholder interviews and surveys
- If there are existing Mission, Vision, Values statements, it's good to refresh participants' memories about those now
- Then, Watkinson leads a SWOT (*a group brainstorming session that identifies Strengths, Weaknesses, Opportunities, Threats for the organization*)
- Break for Dinner (*it's important to allow some down time and participant socialization*)
- Wrap-up of the SWOT - Revisit, recap and 'vote' to decide which items identified in the SWOT are priorities for further consideration during the development of the Strategic Plan. (*Watkinson will have consolidated SWOT items during dinner break.*)

### *Day Two*

Having finished at a reasonable time the night before, a fresh and early start sets the pace for the Day Two. The agenda is more demanding on this second day, so it's best to try to break in the late afternoon if things are going well – a bit of *reward* for participants. Time should be formally scheduled on Day Two for "*catch up with email and calls*" while we're still within business hours - this makes it easier for people to shut off the cell phones and Blackberry's during the day, including during the breaks, and devote their energy and creativity to Strategic Planning.

- Breakfast
- Watkinson presents a recap of previous day's work, and a SWOT Summary
- General discussion of Strategic Direction based on what has been heard so far, and the SWOT Summary "*What is all of this saying to us?*"
- Breakout Sessions to begin drafting Strategic Objectives and Critical Success Factors - Participants Break into 2 to 3 groups, coached by Watkinson
- Lunch (*Working lunch if necessary*)

- Blending the results - Group back in plenary, facilitated by Watkinson, drafting Strategic Objectives and Critical Success Factors – combining the work of the breakout groups
- Dinner followed by social time – and important time to “sleep on” the results so far

### *Day Three*

This is the “flex day”. If the group (and Watkinson) feel that solid progress has been made, it is good to try to wrap up by lunchtime. The rest of the day is scheduled, however, “just in case it’s needed”. Participants are always thrilled to end early on a high note grounded in a solid sense of achievement and success.

- Breakfast
  - Watkinson provides a recap of the work thus far
  - General discussion of Strategic Direction based on what has happened thus far in the Retreat
  - Review of draft Strategic Objectives and Critical Success Factors and further refinement – Watkinson will have done some refinement the evening of Day Two to start things off
  - Finalize Strategic Objectives and Critical Success Factors, discuss Gap Analysis
  - General discussion of Strategic Direction
  - Lunch (working lunch if necessary)
  - If there are no current Vision, Mission and Values statements, this is the time to begin piecing those together – they will have been coming up for discussion during the development of Strategic Objectives so it’s a matter of crafting statements that are sufficiently broad to capture the specific goals and objectives; on the other hand, if they are existing, we take one final look to make sure they are current in light of the outcome of the Retreat
  - Watkinson provides a review of “next steps”
- c. *Strategies 4 Impact!* then prepares a concise report documenting the outcomes, suggesting some refinement to the Objectives and Critical Success Factors if helpful to ensure clear communication.

### **Phase 3 - Transforming Strategy into Action**

This is a critical step that many organizations do not handle well, with the result that the objectives and directions set through Strategic Planning may not be achieved to their full potential.

Tactical or operational planning typically impacts important business components such as:

- human resources
- technology resources
- communications
- branding
- business development
- transition planning for businesses, boards and organizational leadership
- specific operational components e.g. financial management and controls, operating policies and procedures, project management and quality assurance

*Strategies 4 Impact!* will:

- a. Support and work with the leadership team/management in rounding out the Strategic Plan. This involves synthesizing the outcomes of the Retreat, identifying and fleshing out Tactics; further definition of Strategic Objectives and Critical Success Factors; and, analysis of impact on operations and resources.
- b. Facilitate a leadership team/management workshop to develop the outline tactical and operational planning.

#### **Phase 4 - "Circle Back" Session**

- a. *Strategies 4 Impact!* facilitates a half- to full-day workshop of the original Retreat participants, usually 4 to 6 weeks after the Retreat. This allows leadership/management to develop draft tactical plans to demonstrate that the Strategic Plan is feasible and achievable. That process also provides an opportunity to assess human and financial resources necessary to implement the Strategic Plan, including any additional investment which may be necessary.

The key objective of this critically-important "Circle Back" session is to validate the Strategic Plan through a "second look" by the original Retreat participants, after they've had some time to reflect and consider the results.

#### **Advice and Support**

Most organizations engage *Strategies 4 Impact!* to provide ongoing advice and support to them as they implement their Strategic Plan and the tactical planning that is so critical to ensure success.

This helps to ensure a sharp focus on the strategic objectives is consistently maintained, and that investment of precious resources will yield the greatest return.





This professional service is often arranged on a retainer basis, assuring that the advice and support will be there when needed.

### **"Annual Checkup"**

As touched on earlier, *Strategies 4 Impact!* recommends that organizations carry out an "annual checkup" on their Strategic Plan and its execution. This can take the form of a "Mini-Retreat", typically a single day, often combined with some preparatory work by participants the previous evening over dinner. *Strategies 4 Impact!* will:

- Prepare and distribute a "backgrounder" for review by participants prior to the event – this does not usually require extensive research, but will benefit from detailed input of the leadership team/management in particular on the status of the current Strategic Plan and any changes in circumstances which could call for changes to the plan
- Facilitate the discussions during the day
- Build consensus among participants to ensure there are clear conclusions reached
- Prepare a summary report, or amend the Strategic Planning Report, as necessary to reflect the outcome of the Annual Checkup

*Strategies 4 Impact!* is often engaged to facilitate the "Annual Checkup" when it has led the development of the Strategic Plan, bringing back to the process its extensive knowledge and understanding of the organization. *Strategies 4 Impact!* is also engaged for an "Annual Checkup" when it was not the originator, where clients believe they will benefit from a fresh perspective and approach.

For more details and a proposal for professional services tailored to YOUR specific needs, contact:

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