

## **Seven Ways to Supercharge Your Strategic Planning Process**

### **By Gayla Hodges**

At this time of year, many companies look to the future and put together a Strategic Plan and/or a Business Plan for the coming year(s). For many, this has become a matter of looking at the last plan and changing the numbers to match new goals. If this is your process, you're missing a huge opportunity to build the strategic thinking and planning capability of your organization.

Whether you have a team of two, twenty, two hundred or two thousand plus, the strategic planning process provides multiple opportunities to develop employees and positively impact the bottom line. Here are a few suggestions of how to supercharge your strategic planning process and make it a vital part of your organization's success.

#### *Create Pre-Planning Teams*

Charter a team of three or four people to do advance research on industry trends, internal and external factors that will likely affect the future of your company in both positive and negative ways. Build time early in your agenda for a presentation from the team. This not only saves time in your planning session but gives those on the advance team an opportunity to think and learn from the research.

Charter a Stakeholder Audit Team. The size of this team will depend on how many stakeholders you identify. A stakeholder is a person or entity that has a "stake" in your success as a company. Stakeholders might include customers, suppliers, community leaders, etc. The job of this team is to interview these key individuals to get their input about what they need from your organization and/or how you might work more effectively together. This team will need to summarize and analyze the data they collect and bring it back to the planning team for use in the actual planning session.

Be sure to include some of your high potential non-managers on these teams so they are exposed to the process and have the opportunity to think at a higher level than their job usually demands.

See my article: [Building Organizational Capability Through Effective Teaming](http://www.changeagentsinc.com/html/free_articles.html)  
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#### *Include Bargaining Unit Leaders and HR*

If you work with a bargaining unit, include them in the process. Many items become easier to negotiate when Union leaders understand the big picture and the challenges the organization is facing. Also, Union leaders bring the viewpoint of your employees to the table in a unique way that can be very helpful in designing the "people" initiatives you will need to be successful.

Make sure to invite your Human Resources Director/Manager to the table. Many companies put together a strategic plan with multiple "people" strategies without the input of the HR Department. Since most of these strategies will fall to the HR Department for implementation or at least major support, it's in everyone's best interest

to incorporate their ideas as well as making sure the strategies are implemented “as intended.”

#### *Use an Outside Facilitator*

This can either be from another part of your organization or an outside consultant. Either way, your focus should be on the actual strategic thinking and planning. Executives who try to facilitate their own strategic plans are like doctors who try to treat themselves. It's not the best use of your professional expertise. A trained facilitator will bring out the best in each of those participating in the process, including the leader!!

#### *Include a Communications Professional in the Process*

You will want the document you create to be a tool that is used throughout the year. A professional can help you simplify difficult concepts, communicate concisely and format for utility. Remember, the major purpose of the document you distribute to employees is to engage them in the goals of the organization.

#### *Distribute a Copy of the Plan to Each Employee*

Make sure your first line Supervisors understand the major components of your plan and, more importantly, how they will contribute to reaching the goals of the plan. Then, have them distribute copies of the plan. Research shows that employees trust the Supervisor that they know more than upper management. So, roll out the plan but give your Supervisors the info they need to explain it.

#### *Keep the Plan Alive Throughout the Year*

Include regular updates on progress toward strategic goals in your organization's communication channels. Bring the planning team back together once a quarter to review the plan and track progress. Showcase teams or individuals who are directly impacting the success of the plan in company communication vehicles. Most importantly, celebrate milestones reached along the way.

#### *Use the Plan*

If your copy of your company's strategic plan doesn't have dog-eared pages and coffee stains by mid-year, you're not getting the most out of the plan. As a leader, those you interact with should be so used to seeing you with a copy of your plan that they notice when you don't mention it. And, since you are their leader, you will begin to notice that they are bringing up company goals, milestones and impacts on a more regular basis as well. This is the power of the plan. It has the potential to engage people at every level of your organization in striving to meet company goals.

You may be thinking, this is fine for larger companies but I'm an Entrepreneur and/or my company consists of only a few people. How will this work for me? It will actually work very well if you think about all those who have a “stake” in your business and engage them in the process. Ask associates, your Mastermind Group, or key individuals you respect from the networking organizations you belong to for their help in building your plan. That way you will not only build a plan, you will build relationships that energize your success.