

An Approach to Strategic Planning

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Too often, a strategic plan results in a handsome bound report that ends up in prominent positions of the bookshelves of senior management, but results in little or no action. One successful antidote is to create a plan that becomes actionable.

At the core of the plan are three statements developed by the organization:

- *Mission*—its reason for existence
- *Vision*—the effect that it expects to have on those it serves over time
- *Values*—the beliefs that guide the organization and those who work there

As part of the strategic planning process, it is important to do a formal *environmental scan* to assess the forces that are acting on its future, and then conduct a *SWOT analysis*—the internal Strengths and Weaknesses of an organization, and the external Opportunities and Threats that act on it. The environmental scan that precedes the SWOT analysis can be distributed among members of the management team with each person taking an area to research or can be coordinated by one individual. It uses external data and is not done lightly.

With these steps completed, the facilitator leads the organization's board and senior management through the identification of up to five broad *goals*¹ that will represent milestones that it intends to achieve over a set period of time. Goals are broad, but specific. They must be attainable and measurable. Setting goals involves the participation of the organization's board of directors or, in their absence, representatives of whatever governing body to which the organization's management reports.

To achieve each goal, the facilitator works with the senior management team to develop specific *strategies*. Strategies are the means by which the goals will be achieved. It is normally cross-departmental and involves not just what will be done, but considers what must change to make it possible to do it, including resource allocation. Determining strategies may involve board members, but at its core, it is the responsibility of the management team to determine the means by which to achieve the organization's goals.

To implement these strategies, each department or unit manager must identify, assign, and monitor *tactics*. Tactics are specific action steps that an individual is expected to perform to implement the strategy. Each tactic should be measurable, an individual or group should be responsible, and it should have a completion date attached. Final identification of the tactics is the responsibility of management. Board members are not involved at this level of detail. Tactics are typically updated annually. When possible, each tactic should become part of the job expectation of the person responsible for it.

The strategies are normally divided into workable chunks that can be achieved within a year, and tactics added annually to move the organization one step closer to the goal.

¹ The terms *goals*, *strategies*, and *tactics* often vary, but the principal remains the same.

We can think of a strategic plan as an outline:

Mission, Vision, Values

- 1) Goal One
 - a) Strategy One
 - i) Tactic one
 - ii) Tactic two
 - iii) Etc.
 - b) Strategy Two, etc.
- 2) Goal Two, etc.

This allows the organization to summarize its strategic plan for public consumption by publishing only the top levels of this outline. One organization with which we have worked has put its mission, vision, value, strategic goals, and key facts on one two-sided plastic-coated document that is only slightly larger than a playing card.

As always, the devil is in the details, which in this case means the tactics: How well progress toward tactics is monitored, whether tactics are annually updated, and whether employees responsible for them are held accountable.

Using the above outline, here is how one tactic within a strategic plan might be stated and positioned within its goal and strategy.

- 1) Goal: To become the most-recognized cultural destination for families with young children in the community. (To be measured using an independent survey, conducted at the outset and measured annually.)
 - a) Strategy One: Implement a “guerilla marketing” campaign that achieves high share of mind within the community at little or no cost.
 - i) Tactic one: John will institute a system by 9/30 in which the email address of every visitor is captured at the entrance.
 - ii) Tactic two: Mary will institute a blast email program that invites visitors to answer an on-line survey. Those who rate the museum experience high will be given the opportunity to click on a link taking them to the appropriate rating page on Citysearch.com. This will be completed and in operation by 11/30.

Presumably, there would be several tactics within this strategy, and other strategies within the goal. In the end, both John and Mary might be responsible for 2-3 other tactics in addition to their day-to-day jobs over the course of a year.

In this way, the strategic plan actually moves forward. Individuals are responsible for and measured by their *completion of tactics that contribute to strategies that together achieve the organization's goals.*