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## TEN TIPS TO ENHANCE YOUR STRATEGIC PLANNING PROCESS

This article stems from an invitation from Terry Halsch, Executive Vice President of NOREX, to speak to a group of 90 CEOs. I told Terry I was short on time to give the speech, but I would take some time to put my thoughts together for an article. In addition to my thoughts, I thought I'd share some corroborating quotes. Enjoy...

### DO YOUR HOMEWORK

Appropriate pre-work includes a client/customer survey and employee survey at a bare minimum. If time and budget permit, a 360 survey of your senior management team is worth the investment.

*"We talk about the quality of product and service. But what about the quality of our relationships and the quality of our communications and the quality of our promises to each other." -- Max DePree, former CEO, Herman Miller, Inc.*

### KING ARTHUR WAS RIGHT

Round tables work! Use our "Creative Think Tank," use a bed and breakfast, use an Indian reservation, use a Girl Scout camp -- whatever you do, go offsite. I have yet to find a management team that is very creative sitting in coat and tie at a rectangular boardroom table!

*"The real purpose of strategic planning is to alter the mental models of managers... so they can perceive change and respond." -- Peter Senge, Author*

### BUILD THE TEAM

The best strategic planning sessions I have facilitated are those that started with some teambuilding. Break down barriers, get to know one another in new ways, stretch your thinking with a high ropes course, a few laps in a racecar, or the ascent of a mountain peak.

*"If we can climb the highest mountain in Africa, we will have the confidence to climb any mountain in business." -- David Hancock, Managing Director, Apple Computer*

### USE TECHNOLOGY

An "RSVP" system can increase the level of candor and the speed at which decisions are made. Eyeball to eyeball discussions are paramount, but the process of prioritizing, voting, and building consensus can be enhanced considerably through technology.

*"Strategy is about stretching limited resources to fit ambitious aspirations." -- C.K. Prahalad, University of Michigan*

### TURN THE ORGANIZATION INSIDE OUT...

and bring outsiders in. The "power" of the conversation will ratchet up considerably by including key customers and suppliers in all or part of the strategy sessions. Include them in the team building, too; I've seen wonderful things happen.

*"You gain strength, courage, and confidence by every experience from which you must stop and look fear in the face. You must do the thing you think you cannot do." -- Eleanor Roosevelt*



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### **CREATIVITY AT THE COFFEE MAKER**

Allow for down time. Some of the best ideas will surface at the bar, in the restroom, around the campfire, on the golf course. Music, humor, and movement stimulate breakthrough thinking -- use 'em.

*"Vision is not forecasting the future. Nor is it walking around with your head in the clouds or peering into crystal balls. It is a creative act. It is creating the future by taking action in the present." -- Jim Collins, Stanford Business School*

### **LOOPBACK TEAM**

Define a group of employees, customers, and suppliers to "critique" the plan at various stages along the way. Ask them to tear it apart, what makes sense from their perspective, what's missing from their perspective. Your thinking will be stretched along the way.

*"If you want to move people, it has to be toward a vision that's positive for them, that taps important values, that gets them something they desire, and it has to be presented in a compelling way that they feel inspired to follow." -- Martin Luther King*

### **LARGE SCALE**

If the budget permits, and it's feasible, include everyone in a large-scale process. Kathy Dannemiller, a consultant out of Ann Arbor, Michigan, has worked with 2,200 people simultaneously in an arena. Refer back to Eleanor Roosevelt's quote under point 5!

*"Strategies take on value only as committed people infuse them with energy." -- Philip Selznick, Sociologist*

### **USE AN OUTSIDE FACILITATOR**

Without sounding too self-serving, I don't know of many management teams that will ask themselves the toughest questions. A talented and independent set of eyes and ears can help you keep the focus, stretch your thinking, nudge you to make tough decisions, and enhance the candor.

*"If you have 25 priorities, albeit all of them important, you have no priorities!" -- Tom Peters*

### **FAST, FOCUSED, FLEXIBLE, FOLLOW-UP**

I can't imagine anyone going to an athletic club, working out once, and saying "that's it, I'm done, I'm in shape now." The planning process is an ongoing, always evolving, never-ending process; I've seen the greatest success when management teams follow-up every 90 days.

*"Even the most elegant strategy ultimately degrades to action." -- Michael Porter, Harvard Business School*