"A.I.M. Your Initiative" : Strategic Planning

Assess: Do you have last year's plan and associated data?

YES! Excellent! Compiling budget (estimated and actual), department/organizational metrics, strategic/operational milestones, and year end analyses (SWOT, gap, surveys, etc.) is the best place to start.

1. **Dig deep into the data** to determine where the business succeeded and where it fell short. These will become carryover items.

2. **Document internal/external externalities** that caused any deviations. These will need evaluation to determine if they are one-offs or a potential issue.

3. **Don't forget the positive!** Note what worked well, *whether it was an accident or not*. These areas of success become rallying points for new processes and potential efficiency.

**No. Unfortunately, last year <INSERT ORGANIZATIONAL GREMLINS THAT PREVENTED A FOCUS ON STRAT PLANNING HERE> happened.** That is okay! There is never a bad time to create goals. Operational plans broken out by department/team are a great way to take baby steps until formal strategic planning can begin. With a little forethought, short-term operational plans should help build a solid foundation for a solid strategic plan, even if it's months away.

1. **Establish timelines** for how long department/team operational plans need to last until formal strategic planning starts. Having a timeline will help keep short-term goals: Purposeful, measurable, and actionable.

2. **Investment and accountability!** Include managers in the building, maintenance and tracking of operational plans. An invested manager will be integral to making sure the right resources and processes are in place to measure.

3. **Establish the metrics** that will be tracked and create the internal reporting structures to support them if needed.

NOW you're ready to start planning…

⇒ Environmental Scan/historical learnings (**Assess**)

⇒ SWOT/B Analysis (**Assess**)

⇒ Mission/Vision/Values (**Assess**)

⇒ Goals/Strategies/Objectives/Tactics (**Assess**)

⇒ Operational Planning (**Implement**)

⇒ Responsibility & Accountability (**Implement**)

⇒ Follow-Thru/Checkpoints (**Maintain**)
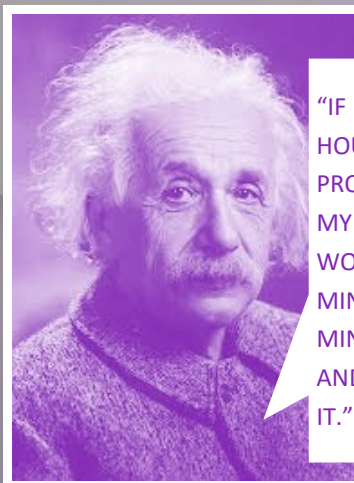
"IF I WERE GIVEN AN HOUR IN WHICH TO DO A PROBLEM UPON WHICH MY LIFE DEPENDED, I WOULD SPEND 40 MINUTES STUDYING IT, 15 MINUTES REVIEWING IT AND 5 MINUTES SOLVING IT."

www.dewittconsultancy.com
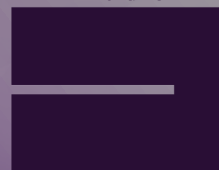
DeWitt
Consultancy Partners

Don't just move. EXECUTE BRILLIANTLY.

Implement: Strategic plan, check. Let's make it operational

Implementing a strategic plan requires 2 steps: Visualization and Actualization

Visualization

1. **Executive team:** Put the strategic plan into a visible form that middle managers can distill into operational plans.

2. **Middle managers:** Create digestible departmental operational plans that align with the strategic plan, address key drivers (financial, customer, process, and learning/growth), are reasonable, measurable, and actionable; give team members opportunity to personally invest.

3. **Team members:** Set team members up for success and organic personal investment by aligning performance plans/goals with operational/strategic goals. Empower initiative.

Actualization

Share the Vision! Strategic plans only work when they are shared widely, discussed often and bumps in the road are accepted!

Maintain: Is your strategic plan a pet rock or a puppy?

Strategic plans don't grow and learn by themselves. They require love, attention...and DISCIPLINE when necessary

Once your plan is place, create and maintain these key activities:

1. **Middle managers:** Meet at least once a month, both collectively as a team and with individuals to review operational metrics. Make reporting/statuses easily visible and accessible. Fix operational bumps as they occur. Respond objectively to feedback. Praise successes and failures! Both are valuable.

2. **Executive team:** Meet at least quarterly to assess strategic plan status. Be open to adjustment. Meet at least monthly with subordinate managers to assess progress. Be ready to help remove roadblocks and address concerns. Use reverse skip level meetings to show team members appreciation and support in the strategic plan investment.

The Final Thought

The worst contributing factor to organizational chaos is the proverbial "lack of a plan", but it doesn't have to stay one. Remember:

**All great changes are preceded by chaos...and DeWitt Consultancy Partners
—Lao Tzu and Kimberly DeWitt**