

The Do's and Don'ts of Strategic Planning

By Rebecca Staton-Reinstein, Ph.D.

Strategic Planning has made a comeback worldwide. Companies, governmental agencies and nonprofits are all adopting it. Although Strategic Planning has been around for years and the basic tools are well known, many leadership teams still stumble in the planning and execution stages. The basic eight pairs of “do’s and don’ts” are based on the experiences of a wide range of organizations. They will help you lock in your prospects for success and avoid common pitfalls.

- **DO follow the (modified) KISS principle: Keep it Simple and Sustained. Less is more.** Your goal is to create goals and objectives that focus your work for the next year or two. Limit the goals and objectives to one page so you can manage on the “top page.”
- **DON'T set too many Goals or Objectives or go into greater detail than necessary.** Too many details, goals or objectives lead to confusion, conflicting goals, micromanagement and failure to execute. A successful plan is not measured by the pound.
- **DO follow all of the steps as described in proven planning methodology as it was designed.** You chose it because of its reputation. Learn from others' success.
- **DON'T skip steps or do them partially.** If you bought an expensive briefcase, you wouldn't immediately change the handle, put on a different carrying strap or have it dyed another color. Avoid tinkering with the process, since you have no data to justify your changes.
- **DO stay focused on the Mission.** The Mission, what the organization wants to do or be, is central for planning and day-to-day execution. Before you accept any goal, objective, strategy or tactic or take action ask, “*How will this help fulfill the Mission?*”
- **DON'T do things because “we’ve always done it,” or “I think we should do it even though it doesn’t fit our Mission.”** Without the Mission driving your decisions, you will miss innovative solutions, drift off course or become reactionary.
- **DO use the “brain dump” activity to alleviate the urge to begin the Tactical Plan prematurely.** You are an excellent tactician and, faced with a problem, you quickly suggest solutions. This is a liability in strategic planning where you and your team have to create high level goals and specific objectives based on the Mission. List *every* idea the team has. Set these ideas, the “brain dump,” aside until you are ready to create the tactical plan.

- **DON'T begin laying out the Tasks before the Mission, Goals and Objectives are clearly stated.** The Mission sets the context for the Goals, which are the context for Objectives, specific, measurable results. Choose tactics to achieve these higher level results from your brain dump at the END of the process.
- **DO Measure, Measure, Measure!** Select useful, significant measurements for all goals, objectives and tactics. What information do you need to make decisions? Revisit KISS: Keep It Simple and Significant.
- **DON'T avoid measurement because it is hard to do.** Measurement may be difficult, especially when dealing with customer satisfaction, employee morale or effectiveness. Define some way to measure these intangibles so you can gauge progress during execution.
- **DO measure quality of results, wherever possible.** Quality measures how customers judge your products or services. This provides the best information for strategic decision making and keeps you focused on the mission and customer.
- **DON'T select productivity measures, just because they are easier to define.** Important as it is, productivity does not tell you if you are creating a product or service that the customer wants. You can always make junk faster. When you focus on quality, you are more productive, since you reduce costly rework.
- **DO provide support, resources, training, guidance, direction and coaching to assure everyone's success.** People cannot perform well unless they have everything they need to do the job. The plan is only as good as its execution, which depends on great people management.
- **DON'T dump people into situations without providing what they need to get the job done.** Delegation means understanding what the person needs to get the job done and providing it. You can only hold people accountable for what they can actually control.
- **DO Manage by Fact:** We are judged by our results. Good planning sets the stage for good performance. Review results regularly to make decisions and manage. The basic dialogue: "Are we on target?" "Yes" "*Keep up the good work.*" "No" "*What is your plan to get back on target?*" **Targets are just targets. Look for root causes of undesired results.** When you are not getting the desired results, investigate the root causes and modify your plans or targets appropriately.
- **DON'T manage by intimidation, placing blame or gut feel.** These approaches don't work since people may comply but they won't be fully engaged. **Don't ignore off target data or make excuses.** The opposite of the

“blame game” is denial. If a goal or objective is not reached, investigate, find the root cause, devise a solution and re-plan. Unfounded hope is not a strategy for success in the real world.

Strategic Planning works because it disciplines the organization to harness the intellectual energy of all employees and guides the organization in a clear direction. The Plan is the Boss. Following these “Do’s and Don’ts” will help you plan and execute successfully.

© Rebecca Staton-Reinstein, Ph.D., President of Advantage Leadership, Inc., works with leaders who want to grow their companies strategically, transform results, and engage employees. She is author of *Conventional Wisdom: How Today’s Leaders Plan, Perform and Progress Like the Founding Fathers* and *Success Planning: A ‘How-To’ Guide For Strategic Planning*. Learn more at www.AdvantageLeadership.com.