

Ten Reasons for Planning to Plan

How many times have you heard the mantra of the goal-oriented motivational speaker: "By failing to plan, you're planning to fail?" In reality, planning to fail is far easier, because planning done well is hard work.

Why is it that only about 5 percent of the businesses and nonprofit organizations in America operate from a written long-range plan? For that very same reason: it's very challenging to do it right and many would rather just go about their day-to-day chores than undertake the steps involved in creating a plan. It's tougher still to follow through and make those long-range goals a reality for the organization.

Why, then, should an organization create a long-range, strategic plan in the first place? Here are 10 reasons as starters:

1. You become less reactive, more proactive – When you go through an effective strategic planning process, you're forced to think ahead. As a result, you begin to consider preventive and preemptive approaches one can only dream about while desperately trying to drain the swamp.
2. You address critical issues – Will your organization take e-commerce seriously? What will that mean to the existing sales force? Without the planning process, these questions can remain unanswered, leaving uncertainty and doubt to rule in your organization.
3. You promote ownership – This refers to ownership of the plan itself. Buy-in is more important than ever in the execution of any plans or initiatives. The more you give associates a chance to participate in plans that involve them, the more likely that they will help you turn those plans into reality.
4. You build your team – Force your management team (or your entire company, if this is practical) to come together and address challenges critical to the future of your business. In the vast majority of instances, the planning process itself will build teamwork among those involved. People faced with a common obstacle or challenge will often draw closer together naturally.
5. You provide clear targets – Another favorite rhetorical question is "How can you hit a target you can't see?" You already know the answer, yet few organizations provide crystal-clear targets of the company's direction.
6. You provide the reasons why – I spoke recently with my junior high school basketball coach. He reflected on the main difference between coaching then and now when he said, "Now, when I tell a kid to do something, he wants to know why." The same is true in your organization. You can preach the company's goals

repeatedly. If you don't communicate the reasons why those goals are critical, you've lost them before you started. The planning process provides you with a platform to share the purpose behind the objectives.

7. You create a key management tool – In this fast-paced world where rapid change is the norm, your profit and loss statement for last month is hardly the best indicator of your organization's progress. When you can see your people taking strong, proactive steps and you can hold them accountable for their short-term action commitments supporting long-term goals, you have a better handle on your true progress.

8. You create a key communications tool – The written plan becomes a critical, visible tool to improve communications at all levels in your company. You can point to the plan as the reason for initiating and following through on specific activities. You can wave the plan as you celebrate a small victory on a task completed. You can even roll it up and pound it on the desk, asking for more action to make it a reality.

9. You gain a competitive advantage – You can reasonably expect that most of your competitors are running hard, working full steam to get ahead of you in the marketplace. You can also bet that they may be too busy to stop and go through the steps required for effective planning. Your investment in that process can become your competitive edge in the months and years to come.

10. You show others how serious you are about your organizational goals – You can't do it alone, even if you're a sole practitioner. You rely on associates, colleagues, suppliers and customers to help you reach those goals. When you can show them where you're heading and why, they're more likely to find ways to help you get there.

Plan for the planners

Congratulations, you've decided to create a plan. Choose your planning team carefully. Go as wide and as deep into the organization as is practically possible. The more participation you have in the creation of the plan, the greater the buy-in and support you'll enjoy later. Conversely, if the planning involves only a few of the key people in your organization, set the time aside now to answer frequently asked questions about the importance of this goal and the timing and deadline for that activity.

I've facilitated planning involving as many as 20 people. It can be done effectively, so don't let someone tell you otherwise. If it's impractical to involve everyone in your organization, set a minimum target of all key department leaders plus a front-line associate from each of those areas to participate. That way, there are at least two people in each area who can emphasize the importance of a particular goal or activity among their respective team members because they participated in the original process.



Many forward-thinking companies also involve customers and key suppliers in their planning process. This adds perspectives to the planning which might otherwise be missing. Nonprofit organizations benefit from involving Boards of Directors and Advisory Board members as well.

Time and site considerations

Set the proper amount of time aside for the planning process. Don't expect that you can create a viable long-range plan in an afternoon. The exact time required will depend upon the number and nature of elements involved in your plan. By using a strategic planning facilitator, you will answer this and many other questions in planning for you're planning.

Find a proper location offsite to hold the planning sessions. This is critical to reduce and eliminate the typically frequent office distractions that can stick a dagger in the heart of an effective planning process. If your participants are contributing hours outside of usual work hours, consider an upscale setting to show appreciation for their contributions. Check on country club membership among your participants. It can provide the proper facilities, refreshments and meals, and, in some cases, recreational opportunities along the way.

Set your meeting dates based on the best available to the highest percentage of your planning team. Accept only death or dismemberment as reasons for absence from the meetings. Participants can be responsive to customers and others at breaks. Communicate clear expectations to those not involved in the planning to address issues to the best of their ability during this critical time. Invoke the 100-Mile Rule, which says that your people will pull you out of this meeting only if they would do the same to get you out of a meeting 100 miles away from the office.

Pre-work gets more work done

Get your participants thinking in advance about the issues and the questions which will arise in the planning process? One strong exercise is to have them write in advance their own responses to the SWOT analysis. SWOT stands for strengths, weaknesses, opportunities and threats. You or your facilitator can compile these responses before the planning sessions, conserving time for prioritizing issues within the four categories based on consensus or some other form of decision-making.

In using a facilitator, I also strongly urge that she or he meet one-on-one with each participant prior to planning. Because relatively few people in business have actually participated in strategic planning, this pre-meeting with the facilitator helps paint a picture allowing the individual to understand what's expected of the participants.

Also consider an advance reading assignment for your participants. There are many books which can help participants bring valuable insights to the planning. My personal favorites are Strategy -Pure and Simple by Michel Robert and The Discipline of Market Leaders by Michael Treacy and Frederik Weirsmas. Each book asks valuable questions which should be considered and addressed during the planning process.

Choosing a facilitator

To do strategic planning well, you deserve a facilitator who has no stake in the content of the plan itself. This is nearly impossible for someone inside your organization. Anyone who has enough knowledge of the organization from the inside to guide the planning team usually has some strong ideas which can be very valuable when added to the planning. Why compromise that person's potential contributions by asking him or her to focus only on the process?

Some schools of thought recommend the president or CEO as the facilitator of planning. This can be a major mistake in most organizations I've seen, for three reasons. First, the top executive is often a strong personality. In this situation, planning is reduced to what the boss says while everyone nods in agreement. Second, it's very difficult for most owners to separate themselves from the content to encourage others to contribute. Third, in the rare instances where a chief executive has the skills to facilitate the process, the organization stands to lose valuable contributions to the plan's content from its leader.

To find the right facilitator outside of your organization, ask your business associates and friends who serve on nonprofit boards. They're likely to have worked with a professional facilitator along the way. Get several candidates for your list.

Interview these facilitators as you would any consultant whom you're considering. Ask for references of organizations they've served in a planning capacity. Check also for specific industry experience. Ask each about the steps to be used in the planning process. Do a little digging with each to check for understanding of the critical issues facing your industry. Your facilitator should be at least conversant about these pressures and how they might impact the content and process of your plan.

Call the references provided and ask some tough questions. Did the facilitator keep things moving or did the process tend to bog down repeatedly? Was the facilitator able to pull out the best thinking of the participants? Did the facilitator take accurate notes? Was the resulting written plan clear and simple? Did the facilitator offer to help you follow through in implementing your plan? How successful have you been in reaching your goals from that planning process? Clarify expectations with your facilitator of choice. Know ahead of time who will act as recorder of the decisions reached in the process and the nature of the document that will contain the written plan. How long will that written plan be? If it's much more than 25 pages, it will appear unwieldy and will likely be doomed to die on a shelf somewhere. In planning done well, this is a working document, one that you will want to refer to often.

Take these steps leading into your strategic planning process. Proper planning for your plan can and will result in one of the best investments you can make in your organization and your people.