

1.1.3. Conception of the project.

The basic steps in a strategic planning process are:

GETTING READY

To get ready for strategic planning, an organization must first assess if it is prepared. Also the leadership and key stakeholders must understand that a shared understanding of its past and possible futures will catalyze more effective and aligned responses to these issues in the present. It is the day-to-day decisions and enactments that ultimately shape an organization.

The moves in this initial part of the process should include:

- Identifying specific issues or choices that the planning process should address.
- Clarify roles (who does what in the process) and the ground rules.
- Creating a planning committee to customize and guide the process.
- Develop an organizational profile and engaging top management in a clear sponsorship role.

The product developed at the end of the Step One is a Work plan.

EXPLORING AND LEARNING AND FINDING COMMON GOALS

The process should now move up and back into history, engaging the intuition and feelings of participants by looking at the big picture. Throughout this stage the group should dialogue and document in an exploratory mode, gathering a common base of respect and understanding for the visioning journey ahead. A solid platform of information and agreements should be created which would serve as a springboard for visioning. When people know what some of the given boundaries are, they are freer to improvise and stretch. Clarifying the understandings at this stage sets up everyone for a launch into visioning. Common moves include:

- Completing a Graphic History.
- Identifying core competencies and historic values.
- Creating a Context Map of the Relevant Environment.
- Analyzing Industry Structure.
- Agreeing on trends, assumptions, and essentials.
- Analyzing strengths, problems, opportunities, and threats of the current organization.

- Interviewing customers, stakeholders and others for their perspectives.

ASSESSING THE SITUATION

An organization must take a clear-eyed look at its current situation. A part of strategic planning, thinking, and management is an awareness of resources and an eye to the future environment, so that an organization can successfully respond to changes in the environment. Situation assessment, therefore, means obtaining current information about the organization's strengths, weaknesses, and performance - information that will highlight the critical issues that the organization faces and that its strategic plan must address. These should include a variety of primary concerns, such as funding issues, new program opportunities, changing regulations or changing needs in the client population, and so on.

The products of step three include: a data base of quality information that will be used to make decisions; and a list of critical issues which demand a response from the organization.

ARTICULATING MISSION, VISION AND GUIDING PRINCIPLES

A mission statement is like an introductory paragraph. It typically describes the reason for the firm's existence, a definition of product and services the organization provides, technologies used to provide these products and services, types of markets and the expertise that sets the firm apart from others.

The vision should describe where the organization is headed and what it intends to be. Its processes seek to create a compelling picture of desirable future states, which often represent quantum changes from the past. They develop stories about the nature and benefits of this future, and work backwards to understand the journey that could carry people to this vision.

Guiding principles, guide the journey to that vision by defining attitudes and policies for all employees. For example the guiding principles of 'B' are:

- focus (on the needs of the customers),
- motivate (people essential for business success),
- apply knowledge (to deliver customers solution),
- manage risk (to the benefit of stakeholders),
- and deliver shareholder value (through sustained profitable growth, business discipline and cost diligence).

The Mission, Vision and guiding principles serve as the foundation for strategic planning. They must be articulated by top management and also by people who lead.

DEVELOPING STRATEGIES, GOALS AND OBJECTIVES

Once an organization's mission has been affirmed and its critical issues identified, it is time to figure out what to do about them: the broad approaches to be taken (strategies), and the general and specific results to be sought (the goals and objectives). Strategies link the learning from the past with the vision by articulating a high level path forward. In a sense, they begin to bring the vision back down to the ground. The moves in this part of the process begin to integrate the work of the prior stages. Strategies should tell a powerful story of where to focus actions.

Strategies, goals, and objectives will come from individual inspiration, group discussion, formal decision-making techniques, and so on - but the bottom line is that, in the end, the leadership agrees on how to address the critical issues.

The product of this step is an outline of the organization's strategic directions - the general strategies, long-range goals, and specific objectives of its response to critical issues.

STRATEGY DEPLOYMENT

The mission has been articulated, the critical issues identified, and the goals and strategies agreed upon. This step essentially involves putting all that down on paper and developing a detailed action plan. If there is one thing that undermines a process of this sort, it is lack of genuine involvement and modeling of its significance. The most direct route is to involve as many people as possible in refining the vision and strategies. Another key part of this step is formal communications that let everyone know what is happening, and building feedback mechanisms. The ultimate success of a strategic visioning process is the extent to which leadership and key stakeholders actually begin living the vision day-to-day. Finally strategic planning is the process of making sure you're doing the right things and doing them right.

EVALUATING AND CHANGING

None of the tasks associated with Strategic Planning are a one time venture. This is due to the changed in time and condition. As events unfold, better way to do things becomes evident. Thus the managers must constantly evaluate performance and monitor the situation. They should make necessary adjustments as required.

FORMAT FOR A STRATEGIC PLAN

A strategic plan is simply a document that summarizes, why an organization exists, what it is trying to accomplish and how it will go about doing so. Its "audience" is anyone who wants to know the organization's most important ideas, issues, and priorities: board members, staff, volunteers, clients, funders, peers at other organizations, the press, and the public.

Below is an example of a common format for strategic plans, which might help writers as they begin trying to organize their thoughts and their material. This is just an example, however, not the one and only way to go about this task.

EXAMPLE: STRATEGY PLANNING PROCESS

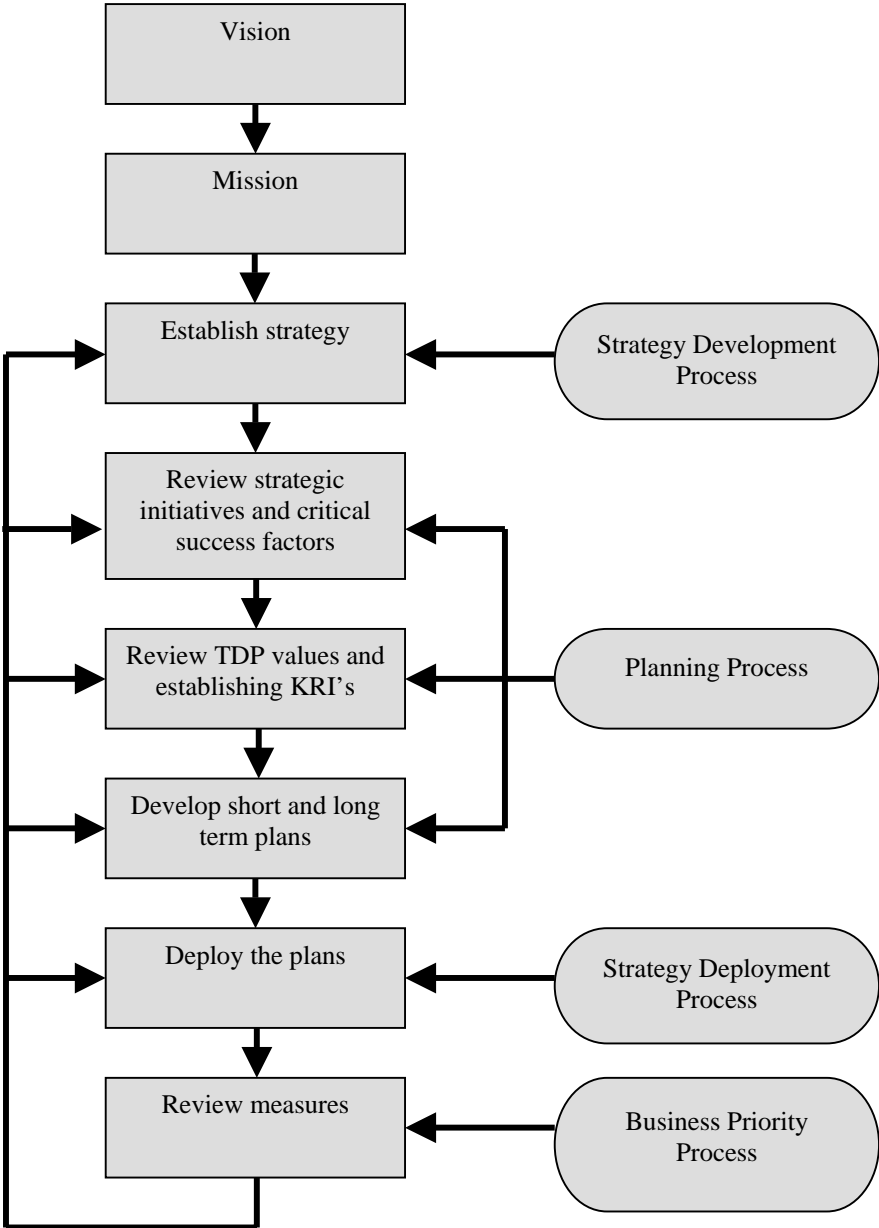


Figure 3. Strategic Planning Process at X company

The sections commonly included in a strategic plan are:

- Introduction by the President of the Board.
- Executive Summary.
- Mission and Vision statements.
- Organization Profile and History.
- Critical Issues and Strategies.
- Program Goals and Objectives.
- Management Goals and Objectives.

BENEFITS OF STRATEGIC PLANNING

- Clearly defines the purpose of the organization and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organization's capacity for implementation.
- Communicates those goals and objectives to the organization's constituents.
- Develops a sense of ownership of the plan.

Ensures the most effective use is made of the organization's resources by focusing the resources on the key priorities.