# "Strategy" and "Planning"

## For Openers:

Ask people who have been involved in strategic planning if they were more excited at the fifth meeting of the planning team than the first. Few hands arise. How sad! So many of our processes take energy out of our organizations rather than putting it in.

We often think that any organization that wants to achieve more success needs a strategic plan. Perhaps. But why is it that so many underperforming organizations — be they schools, hospitals, or any other kind of organization — are awash with improvement plans?

When it comes to planning you know you are in trouble when:

➢ You wait to implement anything until the planning process is complete.

➢ Most people in the organization can't think of one thing they should do differently as a result of having the plan.

➢ Components of the plan (environmental scan, goals and objectives, recommendations, etc) are separately developed then put together by committee.

➢ The plan consists of what the planners believe that others should do to solve a problem.

➢ The focus is on a document, wordsmithed to the point that everyone agrees on the language.

**How much better to:**

- Use early actions to capture the energy of those with an itch to act and build the connection between doing, planning, and learning;

- Build a set of strategies in which everyone in the organization knows just what they must do differently for success to happen;

- Integrate problem and solution, strengths and weaknesses, program and money, learning and evaluation in one seamless path to achieve results;

- Set the price of admission to planning as a personal commitment to go first in changing behavior;

- Start with bold insights and stay as distinctive as possible.

**What means strategy?**

Too often it is a fine adjective to dignify an otherwise listless noun. Plans, operations, processes do not sound very exciting. So we call them strategic plans, strategic operations, strategic processes. Sounds better! But it's not, of course.

To deserve the word strategic, what you develop to guide future action must include **six elements.** Strategy:

1. Starts with an **outcome framework**. Strategy is meaningless without clear expectations for what it is to achieve. Strategies anchor in results, not problems or activities.

2. Offers **comparative advantage**. Not just over what other groups do but over what you yourself have done in the past. No one needs a strategy to keep doing what they have been doing. Strategy is an intervention into past practice. Its point is improvement and change for the organization.

3. Gives **permission to exclude**. All organizations do things that are not strongly connected to results they seek but are hallowed by tradition or just habit. To focus on a few things, it is always necessary to stop focusing on others!

4. **<u>Builds on opportunity</u>**. Few great strategies come out of needs or problem analysis. Most come from a clear look at "solution beacons" – the way things can be. Given that opportunities are time bound (unlike problems which are durable) strategies always depend on timing.

5. **<u>Compresses rather than extends the time things take</u>**. Shortening time builds energy in people and organizations. Prolonging a process tends to erode energy.

6. **<u>Makes all behavior intentional to the result</u>**. This is a matter of alignment — insuring that structure, process, and discretionary use of time all connect to the best way to achieve results — in your case human gain for all dollars available.

If what you develop has these elements, it is strategic. If not, using the word won't help a bit.


## Options to planning

"Strategy" is now invariably embedded in a document - - the "strategy plan". Sadly, most people focus on generating the plan and fail to see how devoid of strategy it can be. Consider **two options** that can bring more life and more strategy to organizational improvement.

### # 1: Maps



Unlike plans, maps create a visual path, beginning with a clear starting point (where you are now) and clear destination. Maps show alternative routes and allow for tracking progress against distance and time. And when it comes to implementation, most of us are better at following a map…than reading a plan!

Maps are more open to insight and opportunity than is a planning exercise. And their visual display of information generates far more collaboration. It is not accidental that many of the best forms of organizational assessment use the language of capacity mapping.

Maps also let you speak to and locate such terrain features as mountains (obstacles to go over, around, or under) and swamps (places that will suck you in, if you don't anticipate and avoid them). Maps also add bridges (whereby you connect to other resources) as well as resting points (achieved milestones) along the way.

## # 2:  Designs

When you want to build something new in your organization, don't plan it, design it! Designs speak to the elements of a program or other "product" that matter to its customers: costs, benefits, instructions, appearance, warranty (what's behind the product) and so on.

When we speak of creating something new and great, we will rarely achieve it with a plan.  Creating is literally about shaping something new and better.

Designing also brings in prototyping — early actions to test critical assumptions before they are set in stone and which build energy through action. Prototypes are what you do <u>during</u> a design process vs. pilots and demonstration projects which are done <u>after</u> a plan is complete.

Design also convenes those who will use the new product rather than everyone who would like to comment on what they need and want. Committed or potential customers shape the product that they will use to achieve the gains a program has defined.

For more information on strategy and alternative ways to create and use it, email us at info@rinstitute.org or call (518) 797-3783.