



STRATEGIC PLANNING

THE ULTIMATE TEAMBUILDING EXPERIENCE

BY MIKE PATTERSON

ASSOCIATIONS HAVE LONG RECOGNIZED THE BENEFITS OF STRONG TEAMS. IN A FAST-CHANGING WORLD THAT FINDS SO MANY BUSINESSES AND ORGANIZATIONS EMPLOYING “FLAT” ORGANIZATIONAL MODELS, WE FIND TEAMING ABILITY TO BE MORE IMPORTANT THAN EVER.

While there are numerous approaches to building teams, one of the most effective ways comes through the strategic planning process, which brings focus and direction to all team members. Strategic planning contributes to a team's ability to maintain clear communications, develop a common vision and work toward well-defined and agreed-upon values, all of which are critical to high-functioning teams.

The strategic planning process helps develop a winning team through a combination of the process a team goes through to establish the plan, and then the plan itself. But while this process may seem straightforward, there are pitfalls that must be avoided in order for the process to succeed in enhancing teamwork rather than detracting from it.

THE PROCESS BUILDS THE TEAM

The strategic planning process requires an association's leadership to discuss, debate and decide on the influencing factors and the actions they should take to address them. Additionally, this process can determine the direction they are headed

as an organization through careful internal and external analysis.

Strategic planning requires the team to ask tough questions regarding the organization's real strengths and weaknesses as well as opportunities to be capitalized upon. Additionally, environmental surveys of the organization and its members/customers can fuel the executive team's discussions. This process forces team members to talk to each other about what they should keep doing, stop doing or start doing differently. It also provides time dedicated to analyzing the organization. Teams can generate powerful ideas when they are allowed the time to think creatively and synergize with each other.

THE IMPORTANCE OF OUTCOMES

Although the strategic planning process goes a long way toward building a stronger team, the outcomes of the process contribute as well by establishing a clear direction. When presented with a forthright statement of the association's strategic intent, all stakeholders — including the board of directors, management team and employees — can better focus on what is needed most for the organization to succeed. This process begins with establishing the organization's values, which define the principles under which it will operate and make decisions. Values clarification in itself allows teams to operate at higher levels, as it creates a common foundation for all team members regarding day-to-day interactions with each other, their customers and their fellow employees.

Once the values of the organization are clear, the creation and articulation of the vision and mission determine the direction the organization will go. This direction develops with an understanding of the company's strengths and weaknesses and the industry's or profession's opportunities and threats, coupled with an in-depth, survey-based understanding of the organization and its members. The analysis and discussion required at this phase are instrumental in getting the team to commit to a direction they are willing to support. It is critical at this point to get consensus from the team, no matter how long it takes to come to this agreement.

While defining its values, vision and mission gives the organization purpose, achievable goals are needed in order for the organization to accomplish its mission. At this stage, negotiations within the organization take place regarding the allocation of limited resources. This part of the process helps all team members understand what resources exist and gives them a say in how these resources are deployed. While some stakeholders will not get what they desire, all will develop an understanding of why the resources are being allocated the way they are. The establishment of goals also gives the board of directors a set of objective measures against which to evaluate the organization's performance. Without clearly defined goals, it is extremely difficult to determine whether progress is being made or to objectively evaluate performance, which creates a sense of unease from management and other stakeholders with regard to success.

The above steps create a plan that all stakeholders can use to maintain focus on the direction to follow and the resources

THE MOST COMMON ERROR ORGANIZATIONS MAKE IN STRATEGIC PLANNING IS SIMPLY UNDERESTIMATING THE AMOUNT OF TIME THIS PROCESS REQUIRES.

that are available, and provide an objective measure by which to evaluate progress. This allows all stakeholders to increase productivity to fulfill the mission of the organization.

POTENTIAL PITFALLS

The strategic planning process is not for the faint of heart, as it takes discipline, patience and hard work to create and execute. The most common error organizations make in strategic planning is simply underestimating the amount of time this



process requires. In order to keep different areas of the organization communicating, strategic planning should be looked at as both an event and a process. An *event* perspective means allocating an entire distraction-free day, or more, for the management team to create a plan that will then be revisited at year's end. A *process* perspective means using the plan to operate the organization by factoring it into decision making and evaluating progress at regular intervals throughout the year. Additionally, a process view will allow updates throughout the year as the environment changes.

Second, an executive leader with the ability to influence the senior management team must champion the strategic planning process. The lack of such an individual often causes the process to derail, as apathy can set in and reduce the chances of the plan being executed and completed. The addition of one person who believes in the process, takes responsibility for its completion and follows through dramatically increases the odds of success.

Third, an objective, experienced external facilitator can increase both productivity and the outcome quality of the process. Since the facilitator does not have an interest in the outcome, he or she can focus on process and help bring out the best thinking of the team.

Most leaders agree that a formal strategic planning process contributes to the effectiveness of an organization. Unfortunately, most also realize that their own organization does not allocate enough time and energy to this process. Why is this? I believe the main reason is the lack of urgency surrounding the task. Most organizations are built around satisfying urgent demands — those created by their members, customers or other clients. While being able to meet these urgent demands is clearly important to the organization's success, the ability to react alone is not enough. To satisfy member demands for years to come and remain a competitive organization, time and energy must be invested in the future. While strategic planning is not a process that can be undertaken in an urgent fashion, it is an important task that requires discipline to execute. ▣

Mike Patterson is president of On Track Leadership, Inc. He may be reached at mike@ontrackleadership.com.