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## **“Rapid Strategic Planning”**

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Strategic planning is often relegated for use at the corporate level only or dropped all together. That is because people think that it requires a lot of time and effort. Good strategic planning can and should be used for corporations, departments, divisions, units, projects, teams, and even individuals. It is simply a process of determining where you want to go and how you will get there. “Strategic” generally means that it is longer term, i.e., over the next 5 to 10 years or more rather than over the next 5 to 10 months. Corporations often spend months or years developing detailed strategic plans. Effective, workable plans can be developed in a matter of days or weeks – or even hours in some cases.

First of all, let me establish some basic principles that I follow for a plan. An effective strategic plan should:

- Be simple, easily communicated, and understandable by those who develop and follow it.
- Be alive – never static or “cast in stone”.
- Look out as far as possible – 10 years or more is appropriate.
- Constantly evolve without lacking direction. Avoid “getting it perfect”.

Some plans, particularly for corporations or major company divisions, require developing detailed information on the current company, industry trends, and competition (called SWOT – Strengths, Weaknesses, Opportunities, Threats). Done properly, this research is ongoing and feeds the strategic planning process. I’ll explore the planning process rather than the research process.

**“Rapid Strategic Planning”** means focusing a group of people to develop a strategic plan without taking weeks or months of effort. By building the plan using short, facilitated sessions that “peel away the layers” of the plan, we build highly effective plans without losing group energy. Here’s how.

Effective strategic planning depends on the involvement of the people. It can not be done in a vacuum effectively. Therefore, workshops are the ideal way to develop strategic plans. One problem with the workshops, though, is that they often take 2 to 3 days or more. Pulling the decision-makers away from business for 2 to 3 days is difficult and seldom done. Instead, a workshop of 1 day or less is a more effective alternative. *I am not a fan of short workshops because of the loss of group evolution, however, planning groups seem to either evolve faster or they are highly dysfunctional and don't evolve even in the 2 to 3 days. Dysfunctional groups take longer, no matter what you do.* I have seen effective plans developed with potentially dysfunctional groups in 4 to 8 hours! A complete plan is not developed in the short workshop, however, a skeleton plan is developed and completed throughout a series of short workshops. Here's how we do that.

### **Preparation**

Preparation is essential to make this process work. The facilitator must interview all of the participants to:

- Identify participants and any potential problems with the group or their expectations.
- Clearly identify the deliverables and understand the group's perception of the deliverables.
- Set the group's expectations of what is going to be accomplished and establish the plan (e.g., number of short workshops) and timeframe for the overall process.
- Develop the detailed agendas for the workshops.

Typical preparation requires 2 to 3 days of effort on the part of the facilitator. It should be conducted 1 to 2 weeks prior to the first workshop.

### **The Workshop**

Develop the plan in workshops. Conduct workshops for 4 to 8 hours every two weeks. It takes from 3 to 8 workshops to complete the plan to a point where it is "done". The workshop process then continues at a more extended pace (e.g., every 3 to 6 months) to continue updating the plan. The agenda for the workshops vary depending on how much you accomplish or which "hot" issues arise between sessions. We normally look to complete one step and parts of the other steps in the first workshop. Subsequent workshops complete the steps. Keep the steps 60 minutes or less. Define how they relate to each other, clearly, in the introduction. The basic agenda components are (excluding introduction and wrap-up):

### **The Agenda**

- Introduction
- Define Your Vision
- Describe the Mission
- Identify Guiding Principles

- Define Objectives
- Describe Current Situation
- Identify the Strategies
- Define Critical Success Factors
- Describe Next Steps
- Review and Wrap Up

**Vision** – This is a step to capture where they are headed. Drawing pictures or developing newspaper headlines is the fastest way to do this.

**Mission** – This captures a statement of why they exist, what they do, and who they do it for. From the prior pictures, have the group craft a statement. Keep this short.

For the next steps, capture a list of candidate ideas, then detail one or two to set the framework. Remaining ideas are completed in subsequent workshops.

**Values** – Important principles (“Customer is always right”) the group believes.

**Objectives** – What they want to accomplish. Objectives are Specific, Measurable, Attainable, Relevant, and Time-based (SMART).

**Strategies** – How they plan to reach their objectives.

Some things to think about are:

- The order can change – and often does.
- Department or unit plans often exclude the guiding principles – they take on their parent organization’s principles.
- Department or unit plans must take into consideration their parent organization’s vision, mission, and objectives.
- Current Situation may be dropped for new units or departments.
- Every strategic planning workshop that I have conducted needed to be modified for team building, creativity, or both.

### **General Problems You Encounter**

You encounter four problems with strategic planning workshops. The problems are:

- Team dysfunction
- Inability to see the future – far enough out to call it “strategic”
- Developing real objectives
- Understanding the components of the plan and how they relate.

### **Team Dysfunction**

If preparation identifies that dysfunction is a problem, be prepared to introduce a variety of team-building activities. One activity will not fix a history of problems. Begin with the introduction (e.g., “Peter/Pauline”) and continue throughout the workshop – especially at the Vision, Guiding Principles, and Strategies steps. Be especially aware during the “Current Situation” as this is an opportunity to undo all corrective actions – with finger pointing, etc.. Do not use an extensive team-building activity unless there is a lot of dysfunction – groups will resist.

### **“Seeing” the Future**

Creativity is especially important for the Vision and Mission. The group needs to “see” who they are and where they are going. Enable visions either by drawing a picture of how they “see” themselves in 10 to 20 years or by writing a newspaper headline they would see at that time. Develop missions by having the group draw a picture of the elements. Use the format of a family crest or coat-of-arms to help.

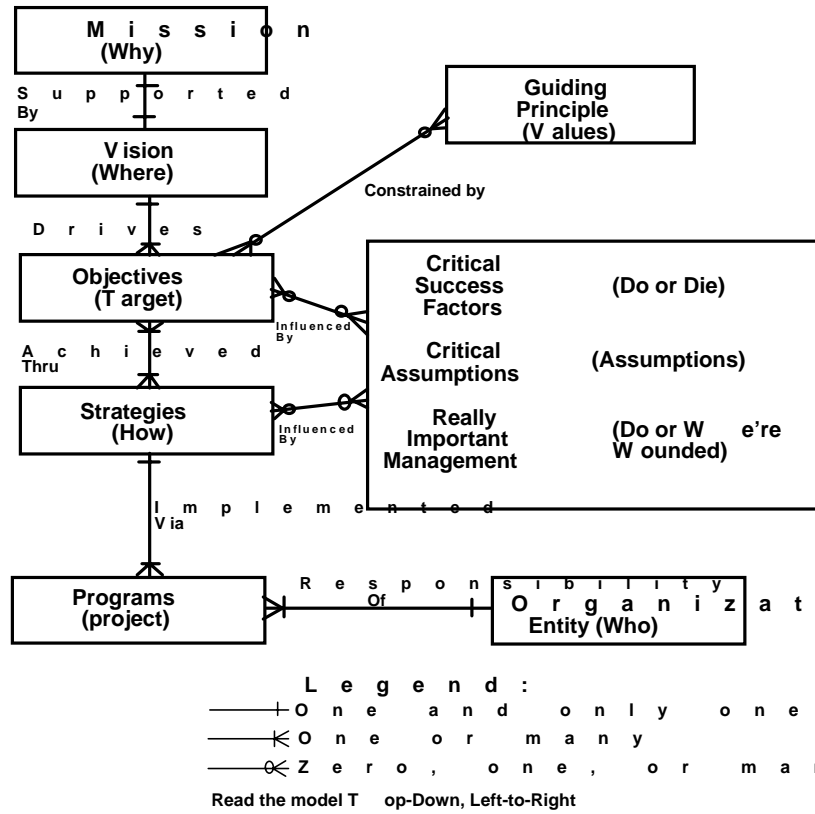
Alter the creativity activities throughout the workshop. Use a different one for each step – so you add variety. Remember to allow 30 to 45 minutes for each activity and **always** use the work immediately in the step. Use the pictures to help the group develop the words.

### **Real Objectives**

Groups often develop weak objectives (e.g., “Be Provider of Choice”). These “objectives” are useless because groups never know if they achieve them. Objectives must be “SMART” – Specific, Measurable, Relevant, and Time-based. An example of a SMART Objective is: “Capture 37% of the Northeastern Home Market, based on units sold, by January 1, 2003.” Specifying objectives properly is context and is the responsibility of both the group and the facilitator. Whether objectives are “good” is content and the responsibility of the group. Groups fail with poorly defined objectives.

### **Understanding the Components**

This particular problem persists throughout the workshop. It persists because the people need to know what goes where. For example, groups often insist that “To add 10 more people by year-end” is an objective. It is really a strategy – it is how they achieve better service or accomplish more. Yet, it sounds like an objective. I found that posting the following picture on the wall helps. It illustrates the components and their relationship. In addition, “keep it simple” words help (words in parentheses).



**Summary**

Incorporate the ideas presented in the appropriate steps. The rest is brainstorming or discussion. Push hard for decisions, keep the components clear, stick with the proper format, and the group will succeed at strategic planning.