

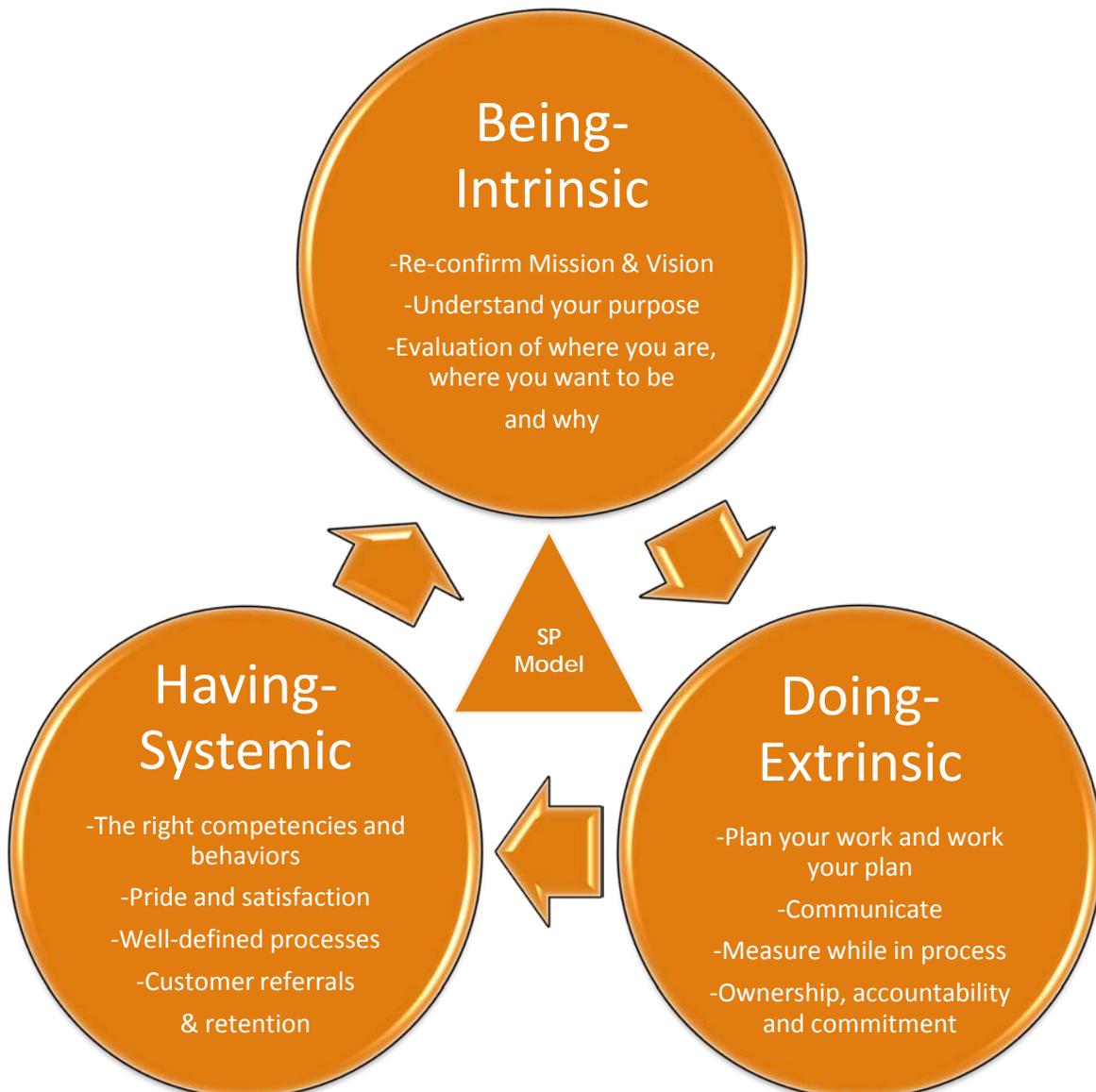
## The Essence of Strategic Planning

Strategic planning is the essential first step to meeting your goals and sustaining the company. An organization uses strategic planning to define its competitive strategy. This in turn enables a company to make decisions on how to allocate resources to best support strategic initiatives.

Strategic planning forces organization leaders to answer the questions: "Where are we going? What should we be doing? How will we do it?"

There are a number of strategic planning process models. You probably already use one that you've developed over the years. In this brief article I will share my thinking on the strategic planning process.

Strategic planning includes an *Intrinsic*, *Extrinsic* and *Systemic* understanding of your business. It also requires focus on the 3 basic elements pictured and outlined below.



**1<sup>ST</sup> – BEING:** It is essential that the executive team stay true to the organization's core values and purpose. It is helpful to remember why the company came into existence in the first place. Understanding your organization's 'reason for being' influences the critical decisions the leadership team must make in a strategic planning session. Having to think through, verbalize and write an intrinsic view of the organization, reinforces the emotional connection to the company. This in turn activates and strengthens vital ingredients for a successful strategic planning session. Those ingredients are: accountability, commitment and passion.

The first step in getting the fly wheel moving and achieving momentum requires self-awareness. Can an organization become self-aware? Sure. Remember the company is made up of people and when a group of people or team gets behind a cause they can achieve almost anything, even landing on the moon. This is called *causal* motivation.

The womb of idea generation is nurtured in the intrinsic stage. The valuing of concepts such as; fulfillment, alignment, development, improving employee morale and welfare, serving the customer and protecting the environment are intrinsic valuing. If your team understands and appreciates the intrinsic view of the company, the decisions of knowing what they need to do and when they need to do it becomes clear.

**2<sup>ND</sup> – DOING:** The next stage in the process is figuring out what to do. Doing includes being self-correcting. Key to making the right choices is first making an adjustment in one's attitude. I will illustrate my point by sharing a coaching conversation. One of my clients asked me how to motivate one of their employees. I asked: Were they motivated when they first joined your organization? He answered yes. I then asked: What have *you* (my client and his company) been doing to de-motivate this person? A hard question, but it revealed a gap in my client's thinking. The perception of organizational behaviors and attitudes you thought were right may be viewed completely differently by your employees.

Self-awareness (BEING) is the education and the foundation for becoming self-correcting (DOING). William James once stated: *"One of the greatest discoveries of my generation was that people were able to change their lives by changing their attitude of mind."* This concept is also applicable to an organizational mindset.

Plan what needs to happen in order to meet your stated goals. Do this by creating a detailed action plan that identifies what needs to be done, when, and by whom. Include accountability measures, rewards and appropriate disciplines that will reinforce the plan. Then flesh out the plan with methodologies and processes. These will help identify company and employee performance goals, as well as the resources needed to assure growth. Using a SWOT analysis will help identify what's working and what you need to do: differently, more of, less of, better, start doing or stop doing.

**3<sup>RD</sup> – HAVING:** Having is the outcome and results you will have generated. It includes; knowing how to sell better, improved systems, new tools, and how to better utilize your resources. It also includes having a greater understanding and appreciation of your products and customers while generating customer loyalty. The HAVING will also be realized in your bottom line (systemic) and motivated and committed employees (intrinsic).

When the discussion on the *vision*, where you are going, why and who you are, is aligned with what you need to accomplish, the potential for HAVING what you *really* want becomes a high probability outcome.

Things change in business every day. People leave your organization, customers may come and go, products may change, and the economy may take a downturn. Therefore, HAVING will always depend on what you are DOING. Companies too often have a yearly strategic planning session and then stick to it regardless of change. Be wise. Be flexible.

Regularly evaluate the current state of affairs. I would recommend that you review *all* 3 concepts regularly. (BEING – DOING – HAVING) Engage in continuous improvement of process. If the results you are having are still aligned with your BEING after six months, you are doing well.

Ultimately what you want to achieve is a dynamic, creative and motivated work force that has become self-generating.

Eric Hoffer an American philosopher said the following:

*“In a time of drastic change it is the learners who inherit the future. The learned usually find themselves equipped to live in a world that no longer exists.”*

**About Jason Kleid:** Jason is an executive coach, sales strategist and trainer. His focus is on developing talent and getting results.

Jason believes it is always the individuals in any organization, where the greatest potential for improvement and possibility of change resides. It is the mind (ones thinking) where new ideas broaden understanding and cause things to happen. However, it is the heart (inner person/motivation) where transformation occurs.