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Rethinking Your Focus: Rapid Strategic Planning In Difficult Times

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Given the contraction and downsizing of the economy, organizations need to urgently rethink their strategies. And for these strategies to be truly successful in the future, they need to be quickly planned and implemented with employee involvement.

Most organizations do strategic planning sessions every few years to decide where they're going and how to get there. Traditionally, this is a top-down process in which the organization's high level managers make all the decisions which they then announce to the rest of the organization.

The traditional approach does include a variety of different groups in the process. But it does so indirectly through focus groups with customers, employees and suppliers, etc. The problem is that it can take months to organize these groups and collate the data. In fact, it can take so long that when the data is ready, it is often irrelevant.

Then once top management uses this data to create the organization's direction, they have to get the rest of the organization to buy into their vision. But this is often difficult because participants usually resist decisions that are imposed on them. This kind of resistance can take a real toll on participant's energy and commitment.

The traditional process spends a lot of money and time on a decision-making process that rarely makes the kind of difference they intended. But it doesn't have to happen that way.

A New Approach To Strategic Planning

The good news is that a new form of strategic planning is being developed in various organizations around the country that is faster, cheaper and more effective as well. And given the urgency of the social and economic times, organizations must take advantage of the speed and inclusion this process offers. It has been called a number of different names including "visioning" retreats and simply "search" conferences. We call our version of it "Rapid Inclusive Strategic Planning" because it includes a wide variety of groups in addition to top management in the actual planning process and happens in a short time frame.

The new approach brings the various groups together all at once for a 2 1/2 day planning retreat. The participants' feedback is collected right then and there and fresh decisions and action plans are based on it. Specific actions are committed to by all the participants and the buy-in is very high because everyone has been involved in the entire process. The whole process only takes about four - six months from choosing the participants to solidifying the final plans after the retreat.

This approach is based upon the pioneering work of consultant Marvin Weisbord (www.futuresearch.net). We have also been inspired by Grove Consulting's graphics and exercises (www.grove.com) which we've found very useful.

Planning The Retreat

To begin the planning process, put together a Sponsoring Team from the various constituencies within your organization. Pick 5 - 10 participants from all aspects of your organization: upper management, middle

management and some rank-and-file workers as well. This Team will pick the participants, choose the retreat site, organize the entire event and do the post-retreat planning.

The Sponsoring Team has the responsibility of choosing the stakeholders who will attend the retreat. In this context, "stakeholder" is a technical term that refers to anyone who affects or is affected by the organization.

So stakeholders might include:

- Managers and employees from all levels of the organization
- Suppliers
- Customers/clients
- Outside experts

Sometimes it is even useful to bring in employees' family members, government officials or community members because of their unique perspective. This inclusive approach has been described in terms of bringing the "whole system" into the room. Casting as wide a net as possible will give you points of view that may normally go unheard but which may prove essential to meeting the organization's long-term objectives.

The retreat should be held off-site in a large room with 8 - 10 tables that can seat 80 - 100 participants. There should be plenty of wall space so that butcher paper or graphics can be hung up for everyone to see.

When you're ready to invite the participants, you should send them a package with the following material in it:

- A letter explaining why they were chosen and why they're important to the process.
- An overview of the entire 2 1/2 day process and a clear statement

of the retreat's purpose.

- An agreement they have to sign and return which spells out their commitment to be present for the whole event and to actively participate in it.
- A workbook which covers the various exercises that will be presented.

Day 1-Creating A Common Understanding

Start the retreat by giving the participants an overview of what will happen. Emphasize that the goal of the retreat is to come to an understanding of the organization's past and its present situation and to get everyone there to commit to specific actions that will create a mutually agreed upon future. Be clear that the focus will not be on problem solving or conflict resolution between groups with strong differences. Rather the intent is to create a vision that everyone can support and to motivate them to make that vision real.

Once everyone is clear about the basics, then you can begin with the first exercise in mixed groups which we call "Our History". It is very simple. You just need to ask the participants to stand up and talk about the group's history, e.g., its origins and early struggles, its mythology, such as starting in a Silicon Valley garage, etc.

Initially, the facilitator should record their answers on 4' x 8' sheets of butcher paper tacked up on the walls. We actually use graphics from Grove Consulting which are specifically designed for the process, but plain butcher paper works just fine. As participants get into the swing of things, it's good to have them write their own comments on the butcher paper.

Allow everyone to speak without judgment. Don't force anyone to talk

who would rather not.

When the exercise is complete, ask the group: "What did you learn from this?" Often participants will say that they weren't aware of certain aspects of the group's history or perhaps they didn't realize the impact of certain decisions or actions.

Occasionally, someone will get angry and say that things shouldn't have been done the way they were. This is fine as long as they don't verbally attack particular participants. Their point of view is welcome.

We call the second exercise a "Context Map". Before you begin it, divide everyone up into their stakeholder groups (because they are usually more familiar with these types of issues). Then ask the participants to name the trends that are currently affecting the organization and its progress.

These trends might include:

- Demographic factors such as your customers' ages, needs or income
- Government regulations and pending legislation
- Economic trends such as rising inflation or interest rates
- New technology and competitive influences

Put everyone's contributions on the butcher paper. Look for common themes and note them on the wall.

Again, ask everyone: "What did you learn?" The responses will vary. Some participants may say that they can really see the "big picture" now. Still others may admit that they feel overwhelmed by how complicated or large the problems are.

The third exercise is called a "SWOT" analysis. This stands for "Strengths", "Weaknesses", "Opportunities" and "Threats":

- Strengths are your organizational capabilities, skills, resources,

reputation and recent successes.

- Weaknesses are organizational limitations, problems, blocks and barriers that would prevent success.
- Opportunities are activities and projects that could benefit the organization by building on strengths or resolving weaknesses.
- Threats are recent or potential problems that could impede, undermine or even threaten the organization's survival.

Have small stakeholder groups do their own work to list specific examples in each of these four categories on a flip chart. Tell them to highlight the ones they feel strongest about and transfer them to the butcher paper on the wall. Ask everyone to do a "gallery walk" to look at each group's butcher paper and then have each of the groups report on what they did. Then look for common themes which should be marked on the butcher paper.

Continue to ask the whole group what they've learned from the last exercise. Participants may say that the problems are bigger or harder or more impossible than they expected. Others may admit that they can now see a bigger picture that wasn't apparent to them.

This completes the first day. Be aware that some participants may leave that day feeling upset about the difficult nature of the problems that are confronting them. Most, however, will acknowledge a larger understanding of issues and a common connection with others. All of this is normal because the process will naturally lead participants through a variety of emotional states that will result in positive feelings of optimism and commitment by the last day.

Day 2-Creating A Common Vision

Day Two begins with the exercise “Cover Story Vision”. For this exercise and the next one, ask participants to sit in mixed groups with a variety of stakeholders together at each table. In their small groups, tell them to imagine that in three years (or five or ten) your organization will be featured on the cover of a national magazine, such as Time, Fortune or Business Week. Ask them to assume that they made the cover because the organization accomplished what they most wanted it to do.

Ask them:

- What headlines and images would be on the cover?
- What would the inside story say about how they got there?
- What would the article’s sidebars say about how they overcame their obstacles? (Sidebars are short articles that explain certain details in the main article.)

Have them put their completed work on the butcher paper. Then ask everyone to take a gallery walk to look at all the responses. Ask each group to report their results.

It is useful for one of the recorders or facilitators to count the times that certain themes recur in the various groups’ work. Also ask the participants to discuss the common themes they found in their gallery walk.

The outcome of all this is that there are usually four or five common themes that are shared by most of the groups. Put these themes on the butcher paper. Also, allow participants to raise other themes that seem to have been neglected so that all points of view are heard.

In the comments section of the exercise, participants often say they are surprised by the number of common themes the very disparate stakeholder groups had in common. But be prepared for perhaps 10% of

the participants to strongly disagree with the themes. These participants tend to come into the event with a very strong agenda and are unlikely to budge - no matter what you do. The best you can do is to make sure that they are heard.

The fifth exercise is called "Five Key Goals" and its purpose is to make the group's abstract visions more concrete. Using their visions as a starting point, ask the small groups to create a mission statement made up of three sentences that answer the following questions:

- Who are we?
- What do we do?
- Why are we different from all similar groups?

Again, the same process is followed. Do a gallery walk and reports to the larger group.

The second part of this exercise involves asking the small groups to come up with "Five Key Goals" that will make their mission statement real and be consistent with the vision. If more than five goals are found as common themes in the small groups' work, then the larger group can rank the various goals to arrive at the top five.

Follow the same process of a gallery walk and group reports and comments. Participants usually say that they are energized and excited by the day's work. This ends the second day.

Day 3-Making Plans

The final exercise on the third day is called "Making It Happen". It is done in the original stakeholder groups because they are largely responsible for carrying out the plans. What it basically involves is creating a strategic plan by breaking the top five goals into specific steps or tasks. Tell each

group to pick one or two goals that they're most committed to. Then the group members might state the particular skills that each of them can contribute to the process.

Next they should use the flip chart to break each one of the chosen goals into a logical series of steps that will accomplish them. The steps should be specific, measurable and be given particular dates when they will be completed.

Have them look at the various kinds of support and resources they'll need to accomplish their goals. It would also be useful for them to explore the challenges that might arise and how they could overcome them.

Once everyone has done the gallery walk, each group will have an opportunity to share what they've committed to doing with the larger group. And again, everyone should be given a chance to comment on the exercise. Participants are often amazed at how practical the plans are that developed out of the intense 2 1/2 day experience. They often say that they were moved by the level of cooperation and support that they experienced during the whole event.

Finally, the entire retreat should be completed by asking everyone to talk about their experiences and what they've learned. Participants usually say that they were able to really hear other stakeholder groups' point of view for the first time and that they have a new sense of respect and understanding for the other groups.

Following Up

We want to emphasize that there will invariably be a number of redundancies and missing pieces in the plans that are generated. But it is not the group's purpose to attempt to reconcile these differences during the

retreat. The planning committee will take the various plans away for 2 - 4 weeks to create a master plan. Once that's done, it should be given to all of the participants for review and agreement on action steps. Of course, follow-up should be done to make sure that the various groups are on track with their particular plans.

In our experience, Rapid Inclusive Strategic Planning is much more effective than the traditional approach. If you're dissatisfied with the results of the traditional approach, then try this one instead. It's faster, less expensive and it usually gets better results. Given the urgency of the times, you can't afford to wait.

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