

# Strategic Planning Pitfalls - Before, During and After



BY BOB HARRIS, CAE

IMAGINE PREPARING FOR months to plan the leadership retreat. You've convinced busy volunteers to chart a course for the organization.

Assume you're at the retreat and during the first hour you see the board chairman glaring at you; you notice a few members doodling; and the executive officers are looking at you with angst.

You interpret their body language correctly as, "Don't you know the value of our time?" As the CEO you wonder if strategic planning (or the facilitator) was a mistake.

To avoid this scenario, break down the planning process into three phases - before, during and after.

## THREE PHASES OF PLANNING - 91 DAYS

A strategic plan is a roadmap to guide the organization, the leadership and staff. It offers a message that the organization has a worthy mission and goals to fulfill. With no plan, volunteers and staff tend to wander from crisis to crisis.

Break down planning into three phases: *Before*, *During* and *After*. *Before* will require 60 days. *During* may take one or two days. *After* requires about 30 days.

### BEFORE

**"Before"** concerns the determination to create a plan and answers critical questions leading up to the retreat.

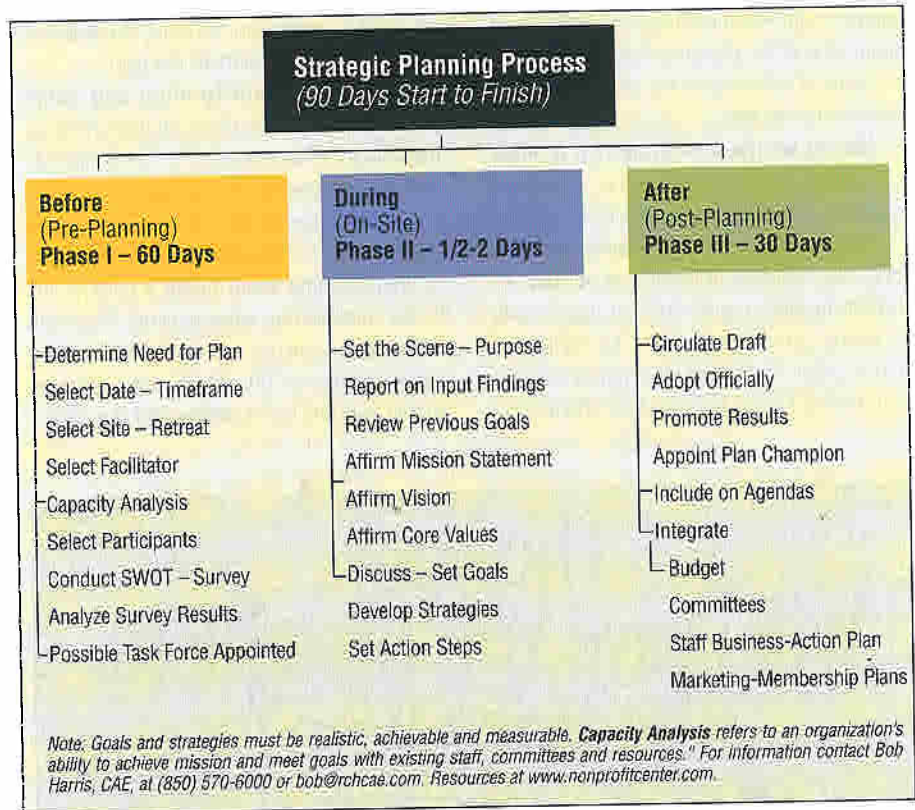
**Who should participate?** A planning session with too many people bogs down the process; too few people and you miss the diverse input. An ideal number at the table is about 20 persons - a manageable group, allowing input by everyone. If your board is small, consider inviting other stakeholders such as chapter representatives, key committee chairs, younger members and senior staff members. One of the traps of planning is to exclude the staff that can offer valuable information and can benefit from the discussions.

**Where to do the planning?** Interruptions such as phones are planning distractions. Find a relaxed setting away from familiar offices. Just the act of driving an hour away and being in a new environment is a catalyst for good planning.

**How long should it take?** Most plans are conducted in a day or two. It is ideal to begin one day, take a relaxing break that night, and return to finish it the next morning. Three-day retreats ask a lot of busy leaders. More often, organizations are asking if planning can be done in a few hours. Discuss with the leadership how much time they have to contribute and if they prefer one, two or three days. The shorter the allotted planning time, the less attention to action steps and accountability.

**Do we conduct surveys?** Be sure to ask the members for their input. If you neglect this step you'll be asked, "Why didn't you ask the members for input?" Consider surveys of members and leadership to determine their priorities. An adaptation of the S.W.O.T. format (strengths, weaknesses, opportunities, and threats) creates an effective survey.

**What about a strategic planning committee?** Many of the decisions and survey development can be managed by committee. They can also conduct focus groups for additional stakeholder feedback. Beware of the



## Strategic Planning Terminology

AWARENESS OF *planning terminology* is key at the onset so that participants agree upon the common words and phrases.

**Strategic Planning** – A process to identify, discuss and set out comes for the organization. Participants should be visionary in understanding and setting a realistic course to best position the organization. The timeframe may cover a year to 10 years, though a three-year plan duration is common.

**Mission Statement** – The mission statement is the foundation of the organization's existence and operations. It identifies the organization, the members or audiences, and the services, in one to three precisely worded sentences; also serves a public relations need. Mission statements are frequently found in or adapted from the bylaws or articles of incorporation.

**Vision Statement** – A lofty statement that answers: "What and where do we want to be in the distant future?" In writing a vision statement, consider that you have unlimited resources and thus you can take the industry or profession in the best direction to meet their needs. For example, "XYZ organization will be the premier organization in the state to serve the needs of all professionals."

**Values** – Core values are consistent with the mission. They inform audiences of the organization's principles. It is better to adopt a value statement than to amend the mission, vision or bylaws.

**Goals** – Goals are the major thrusts for the organization. The planning process should result in three to seven goals. They should be SMART: Specific, Measurable, Attainable, Realistic, and Timed. Synonymous with "objectives."

**Strategies** – Strategies fall under goals. While the goals indicate direction for the organization, the strategies more specifically identify directives for achieving the goals. From a PR perspective, the strategies will be judged as to what actions the organization will be undertaking to benefit the members.

**Action Steps** – Action steps are very specific to achieve the strategies. Action steps take into account deadlines, quantifiable specifics, persons committed to doing the work, outsourcing, resources, etc. Plans often fail that do not include action steps set by the planners or the staff.

**Integration-Alignment** – The organization's budget and committees may need to be re-aligned with the goals of the strategic plan. Many organizations appoint only committees that support the goals, i.e. seven goals, seven committees.

**Public Relations** – The final process of strategic planning will include telling constituents, allies and others the results of the strategic plan. An important aspect of the strategic plan often neglected.

**Plan Champion** – A person appointed to be responsible to report on and keep the plan in the forefront of meeting agendas and budgets.

Note: Goals and strategies must be realistic, achievable, and measurable. **Capacity Analysis** refers to organization's ability to achieve mission and goals with existing staff, committees and resources. For information contact Bob Harris, CAE, at (850) 570-6000 or bob@rhcae.com. Resources at www.nonprofitcenter.com.

spread accordingly. Little is more disheartening to staff than to see a plan that dumps everything into the first year. If some good goals are suggested but just don't fit inside the duration of the plan, consider "Parking" them so that the next planning retreat can review recommended goals that were not included in the current plan.

**What about action steps and accountability?** Longer retreats allow more discussion of action steps. These are the identification of quantifiable measurements and the delegation of the work. Some boards

like to tackle action steps while others feel it borders on micromanagement and can be best handled by staff. If the plan does not include action steps, deadlines, and committee assignments, then staff should draft an action or business plan for the year – based on the strategic plan.

**What's the final report look like?** Planning can result in a 40 to 100-page document. Consider that the staff and leadership have to read and use the plan, so shorter may be better. There is minimal value in long reports that include every discussion, survey

## Appoint a plan champion who will monitor and report on progress or setbacks.

results, sample questionnaires, brainstorming dialogs, etc. – they distract from the actual plan. To create the report you want, envision how leaders and staff will use it. The mission, vision, values, goals, strategies and action steps can be formatted in seven to 20 pages, making it easy to read and use. When hiring a facilitator, ask to see samples and discuss the final plan format that suits your needs.

### AFTER

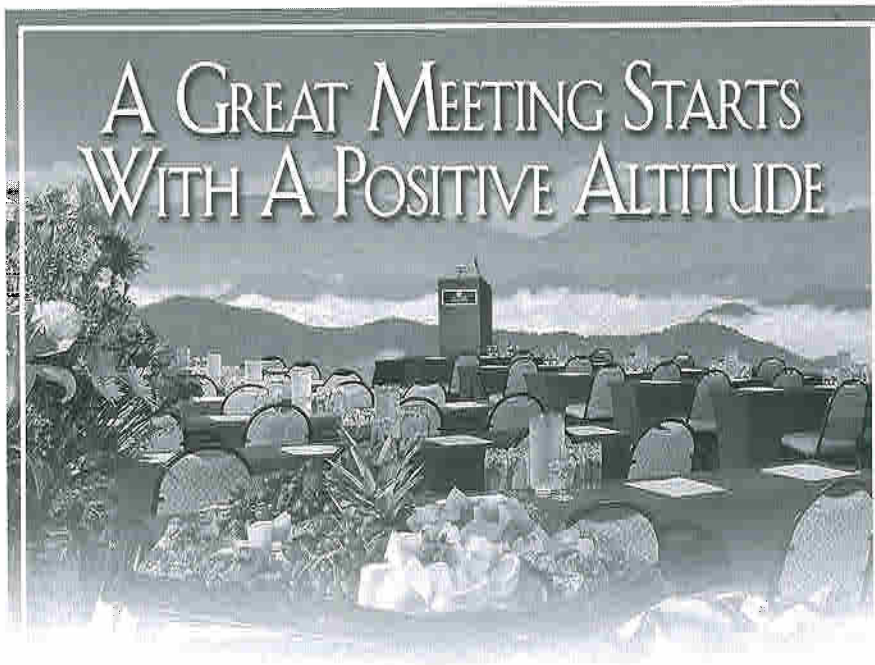
**"After"** the retreat, the next 30 days is critical for success of the plan.

**Do we officially adopt the plan?** When the retreat is over, transcribe the notes and flipchart pages into a dynamic document. It has public relations value so keep it upbeat and celebrate the results and participants. Within 30 days, circulate it to participants and key stakeholders for review. Officially adopt the plan at the next meeting of the board.

**Does the plan get publicized?** At this point, 98 percent of the process is done. One last step is to market the new plan. Create a newsletter article, information for the Web site, a press release or brochure that describes the new goals. One way to make sure the plan gets accomplished is to tell others about the goals, programs and services they can anticipate from the organization.

**How do we keep the plan alive?** Many organizations put the plan in a notebook and slide it on the shelf to collect dust. Appoint a plan champion who will monitor and report on progress or setbacks. To be sure the plan is discussed at board meetings include an agenda item, "Strategic Plan Update."

**Does the plan affect the budget?** The plan is not independent of other operations. It will have an impact on the budget, committees and marketing. Integrate the new goals and strategies into existing programs and operations.



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