











# Strategic Planning Process



## Strategic Planning Module Research Questions





1. Why me?
2. What are the Design Specs?
3. How do I “Think inside the box?”
4. What does planning look like?
5. What are the Gems of Wisdom?
6. How does this really work?

# Why me?

or

“How do the guides to action and lists assist in individual projects?”

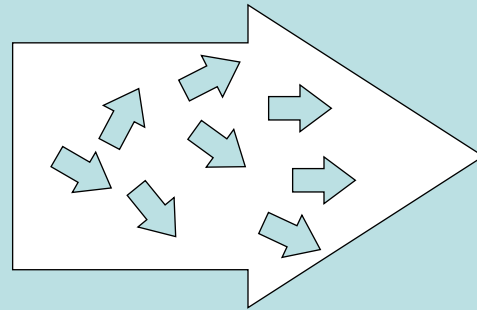
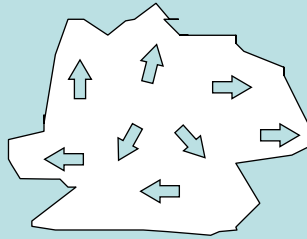
# Sound Familiar

- Lack of Communication with internal and external customers. 6,6,1,5=72
- Denial there is need of change and when recognized no follow through. 7,5=24
- Lack of priorities. 6,7=20)
- Lack of infrastructure and planning and communication between N. Y. and Chattanooga and L. A. and Paris. 4,6=20



## Guided Problem Solving

**Traditional Planning**  
**Results: Limited Progress**



**Participative Planning**  
**Process: Focused Progress**



## Typical vs Performance Planning Improvement Planning

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Formal</li></ul>                                 | <ul style="list-style-type: none"><li>• Structured but less formal</li></ul>              |
| <hr/>  | <hr/>   |
| <ul style="list-style-type: none"><li>• Focus on Plan</li></ul>                          | <ul style="list-style-type: none"><li>• Focus on plan &amp; process</li></ul>             |
| <hr/>  | <hr/>   |
| <ul style="list-style-type: none"><li>• Budget Driven</li></ul>                          | <ul style="list-style-type: none"><li>• Plan drives budget</li></ul>                      |
| <hr/>  | <hr/>   |
| <ul style="list-style-type: none"><li>• Top management &amp; their consultants</li></ul> | <ul style="list-style-type: none"><li>• Involvement at all levels of management</li></ul> |
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# Project Integration Management

## Company Planning

Vision  
Mission  
Guiding Principles  
Strategic Objectives  
Tactical Objectives  
Action Plans

## Personal Planning

Vision  
Guiding Principles  
5 year plan objectives

**PROJECTS**



# Research Question What are the Design Specs?



Or


There are tons of models;  
which one do I use?







## Strategic Planning Desired Outcomes


- Generation of ownership for the plan
- Integration & coordination of ongoing improvement activities
- Timely completion & distribution of the plan









## Strategic Planning Desired Outcomes

- Effective improvement of the organization
- Improved collective understanding of the organization
- Develop managers to take strategic business view



## Strategic Planning Guiding Principles



- The process by which you plan is as important as the plan itself
- Those who must implement must be involved
- Top management involvement = precondition for success




## Strategic Planning Design Specifications



- Taps entire wisdom of team
- Efficiently uses team's time
- Structured but not overly formal
- Begin with "Vision" but contains "Monday Morning" action items

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## Strategic Planning


### How do I “Think inside the box?”

Or


How do I integrate and avoid  
flavor of the month?

WAMP  
Workforce Aging Management Program  
INITIATIVE

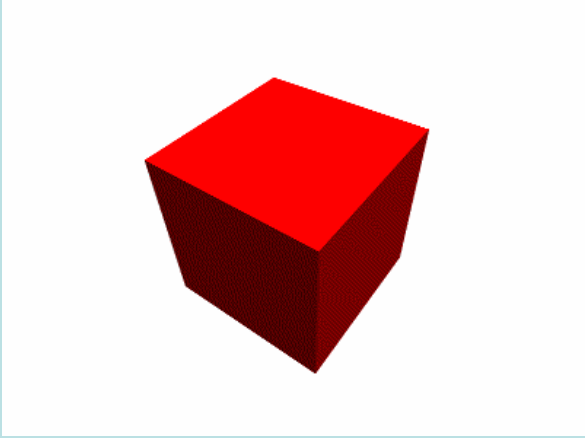
Chattanooga State  
COLLEGE ON THE MOVE



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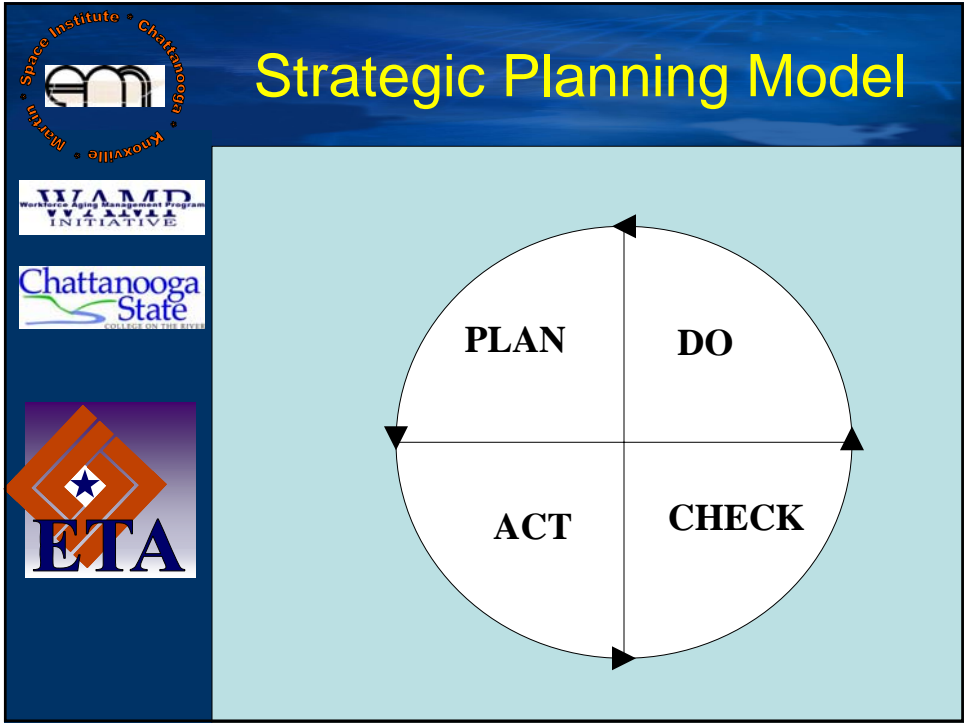
## Think Inside the Box

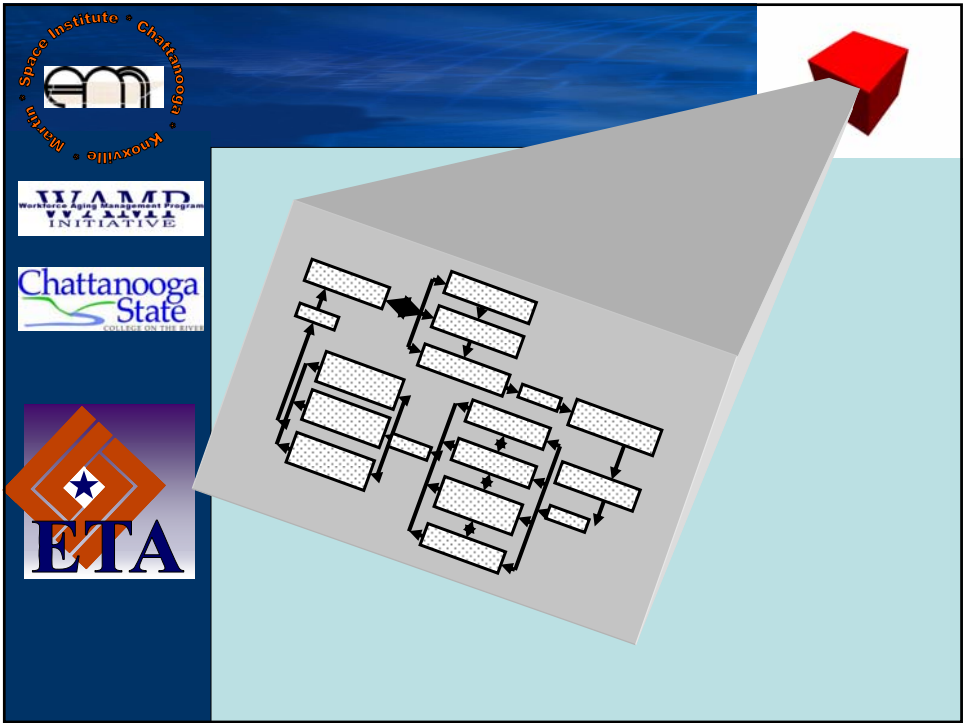
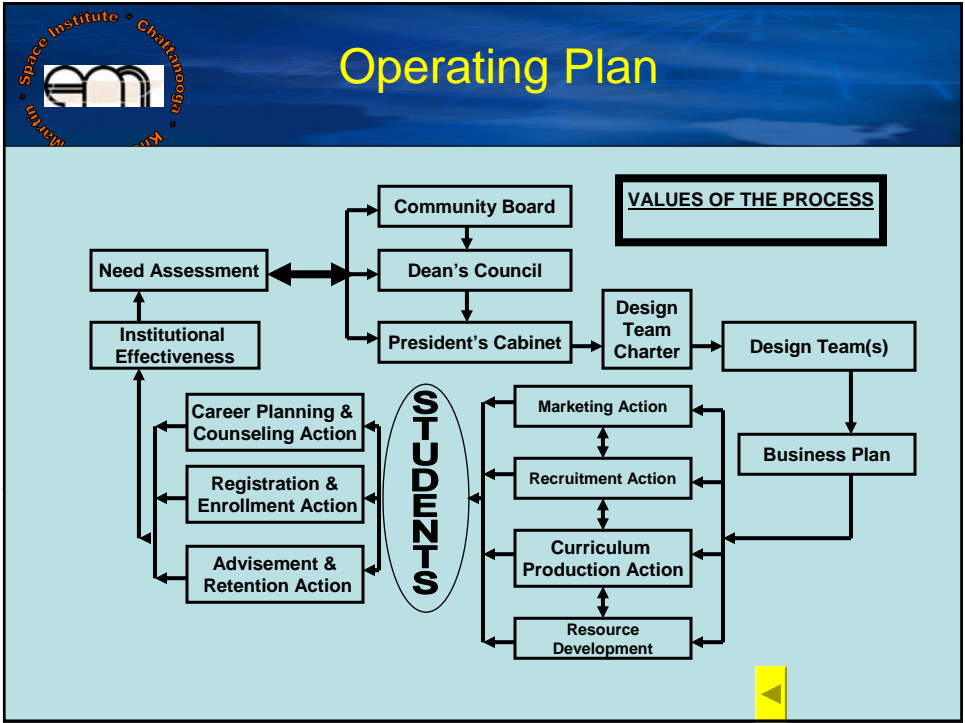


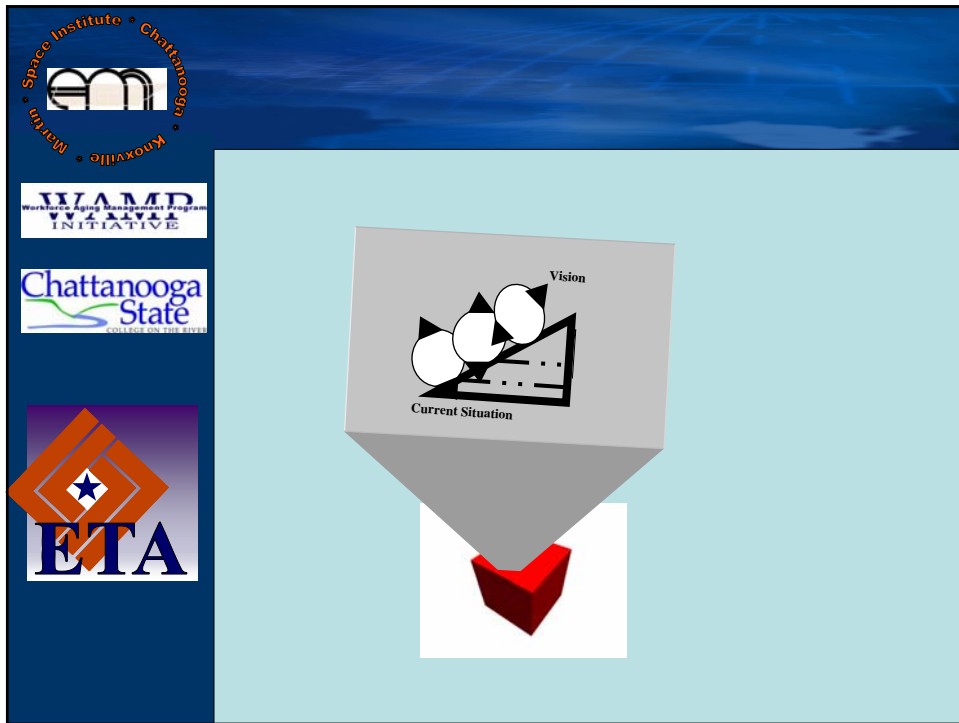
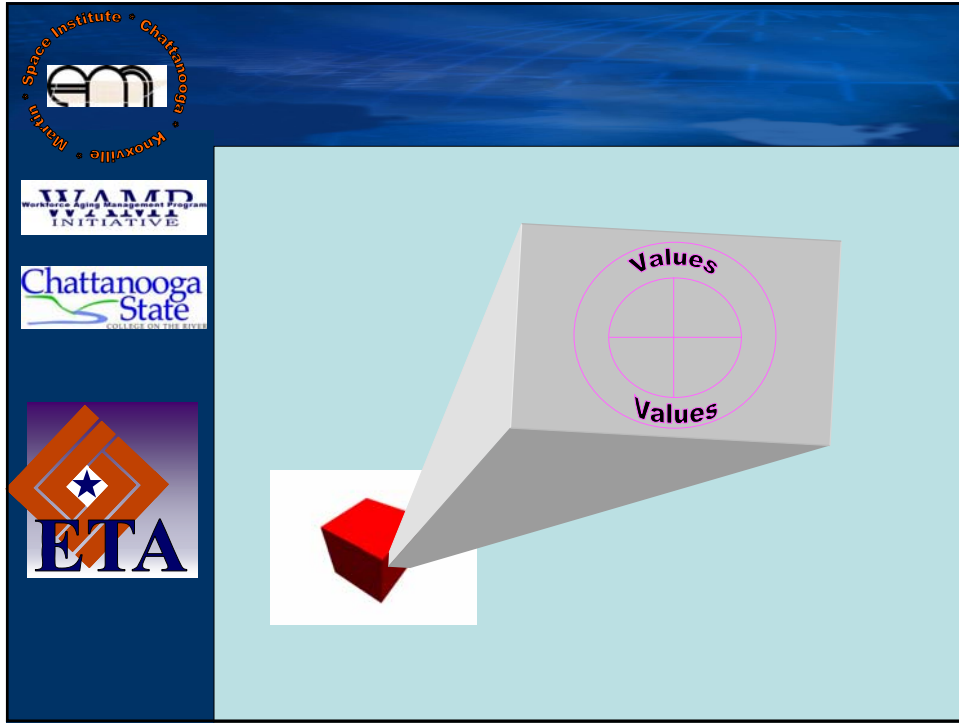
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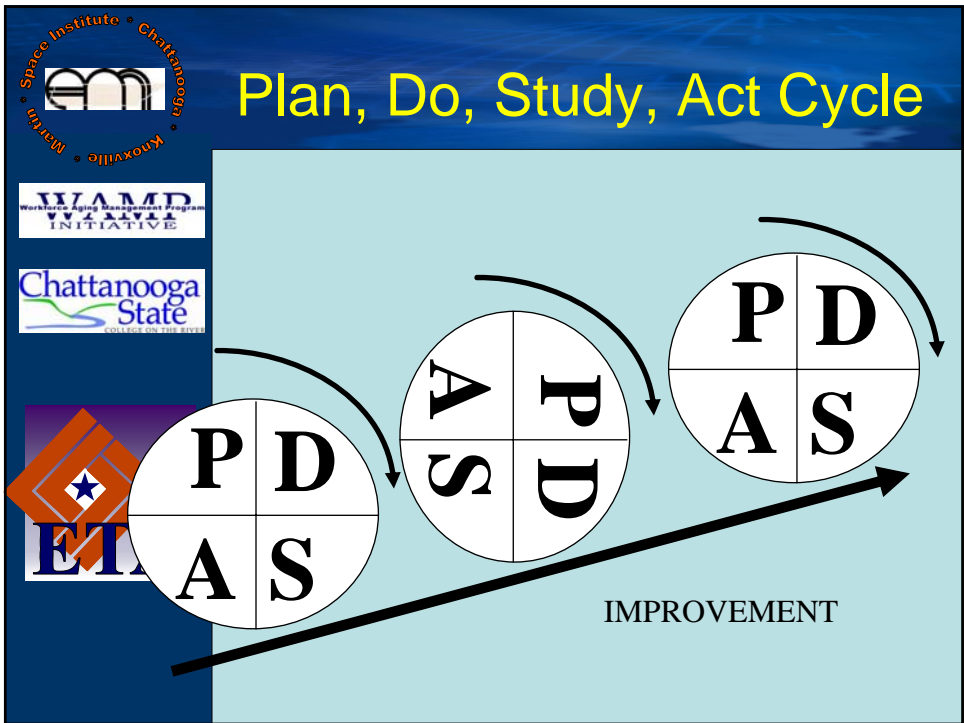
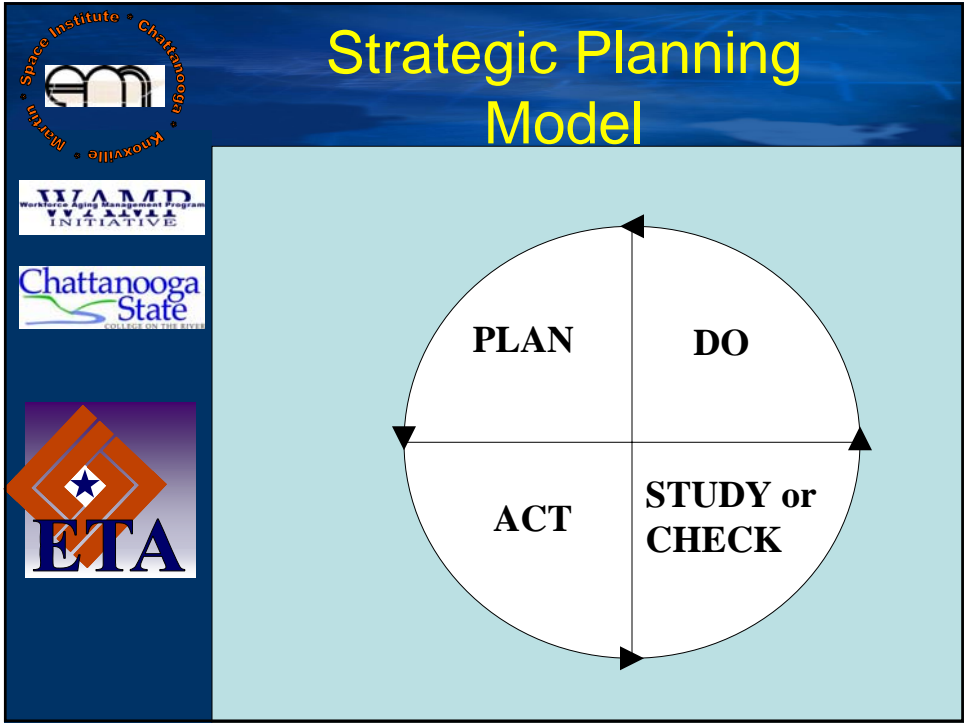
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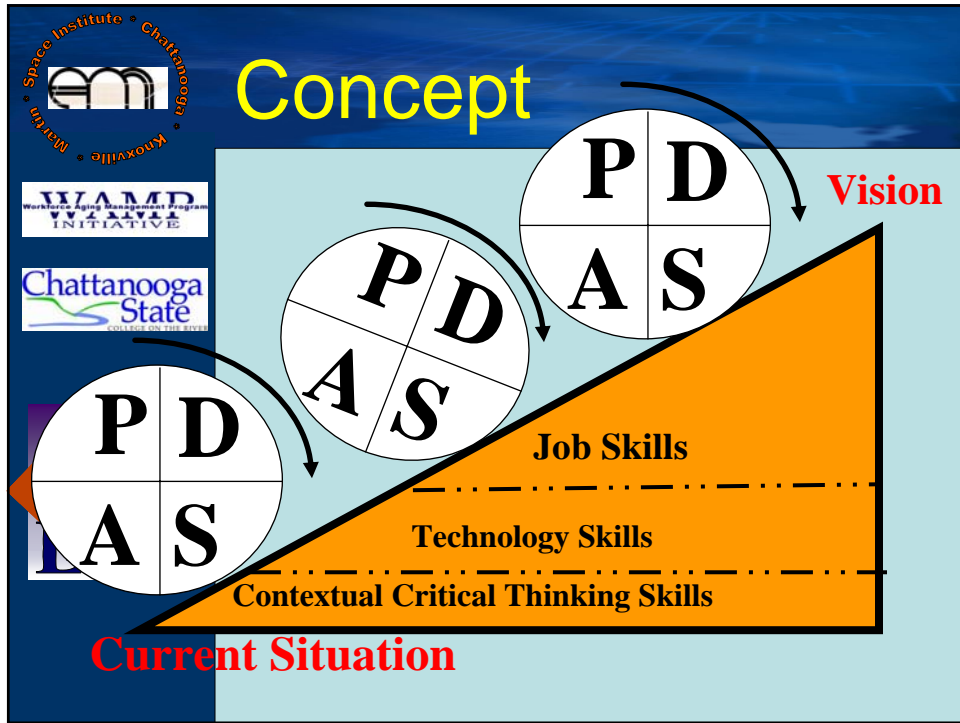














# Bumps in the Road









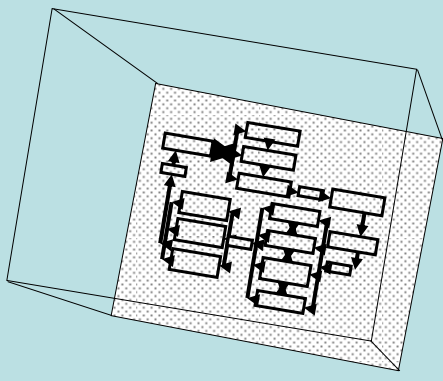

Values  
Your Organization  
Values

Time, Money, Place

Focus Group Issues



# Thinking Inside the Box

**Strategic Planning**  
What does planning look like?

Or  
Let's go through a "model"









## Strategic Management Process

1. Organizational Systems Analysis
2. Planning Assumptions- Probability of Assumptions and Constraints
3. Strategic Objectives- 5 years to realize Vision
4. Tactical Objectives- 12 months to realize Strategic and Vision



## Strategic Management Process

5. Project Planning
6. Project Management
7. Measurement & Evaluation
8. Tracking & Control







# 1. Organizational Systems Analysis

Purpose

- Prepare team for planning
- Improve collective understanding
- Open team minds






# 1. Organizational Systems Analysis





- Vision-Articulated picture of the future
- Guiding Principles- Underlying values and beliefs
- Mission- Statement of organizational purpose
- Input/Output Analysis- Systems Boundary View






# 1. Organizational Systems Analysis

- Internal Strategic Analysis- Identification of strengths and weaknesses
- Current Performance Levels- Formal examination of performance
- Roadblocks - Impediments to excellence
- External Strategic Analysis- Identification of opportunities, threats, trends, and problems

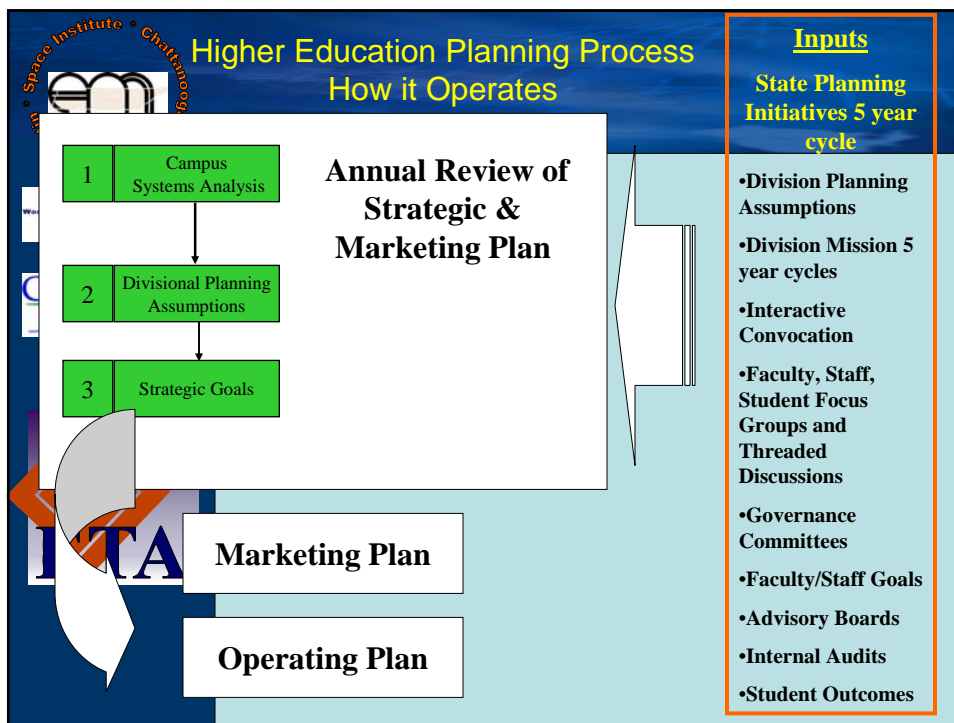
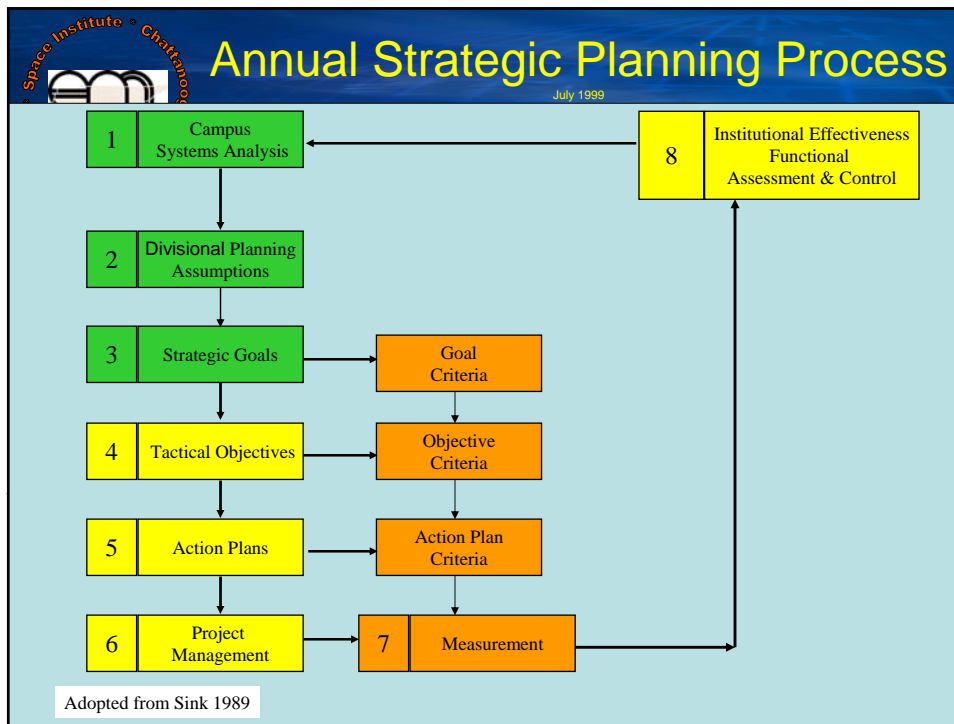
# CROPIS Analysis Identifies

- Customers
- Requirements/Desired Outcomes
- Outputs
- Processes
- Inputs
- Suppliers

**Strategic Planning**  
**Does planning work?**

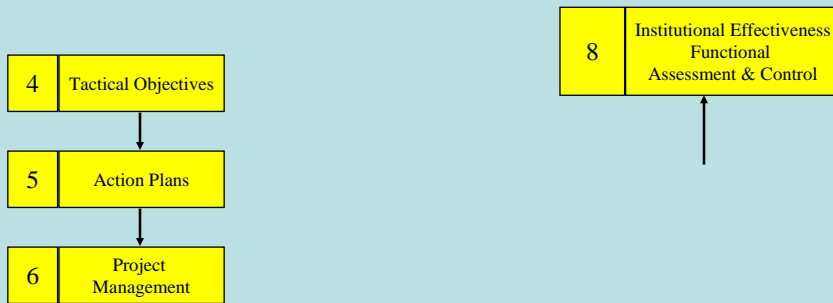
Or  
Let's go through an  
"example"



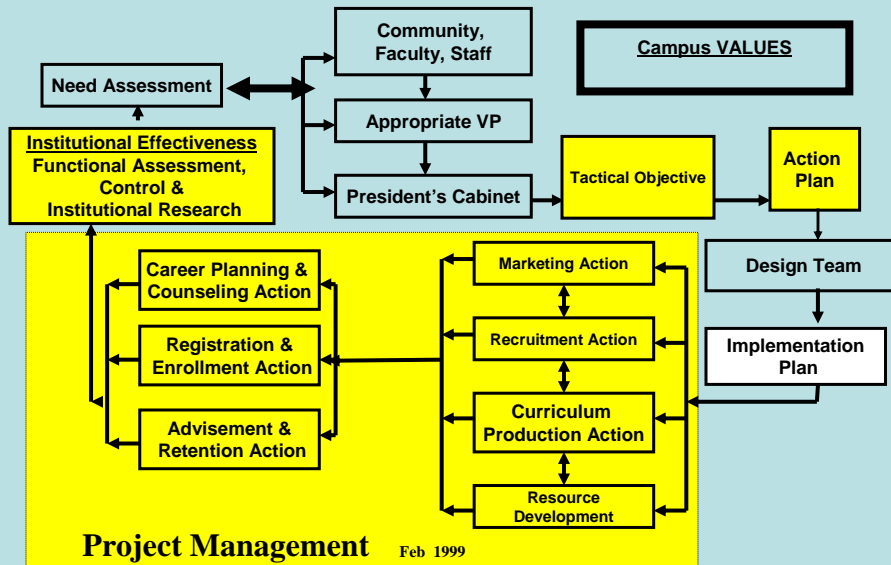


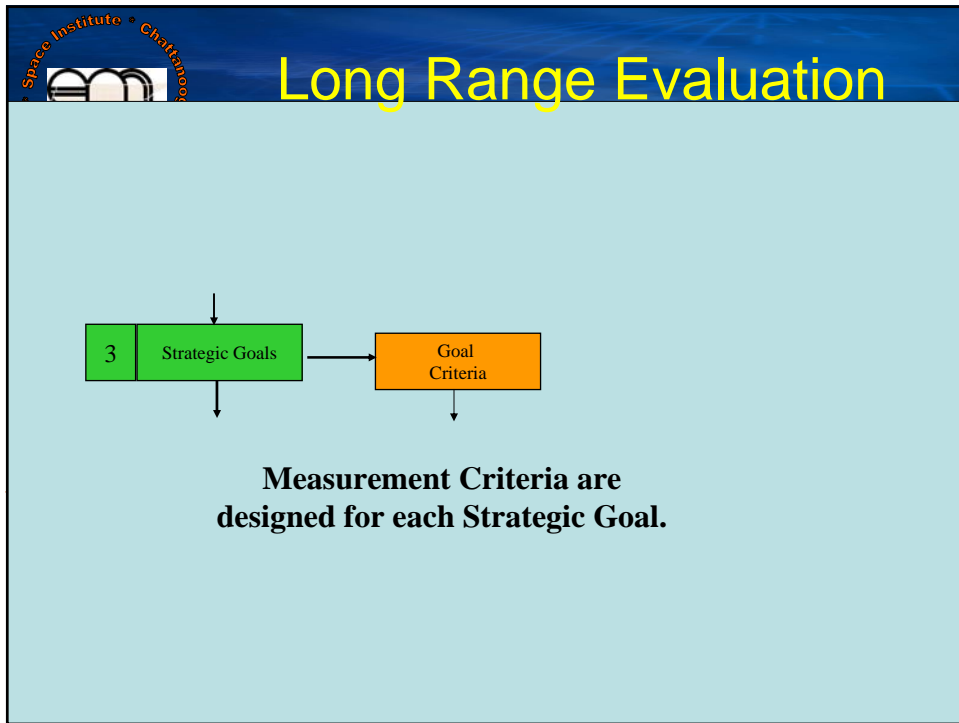
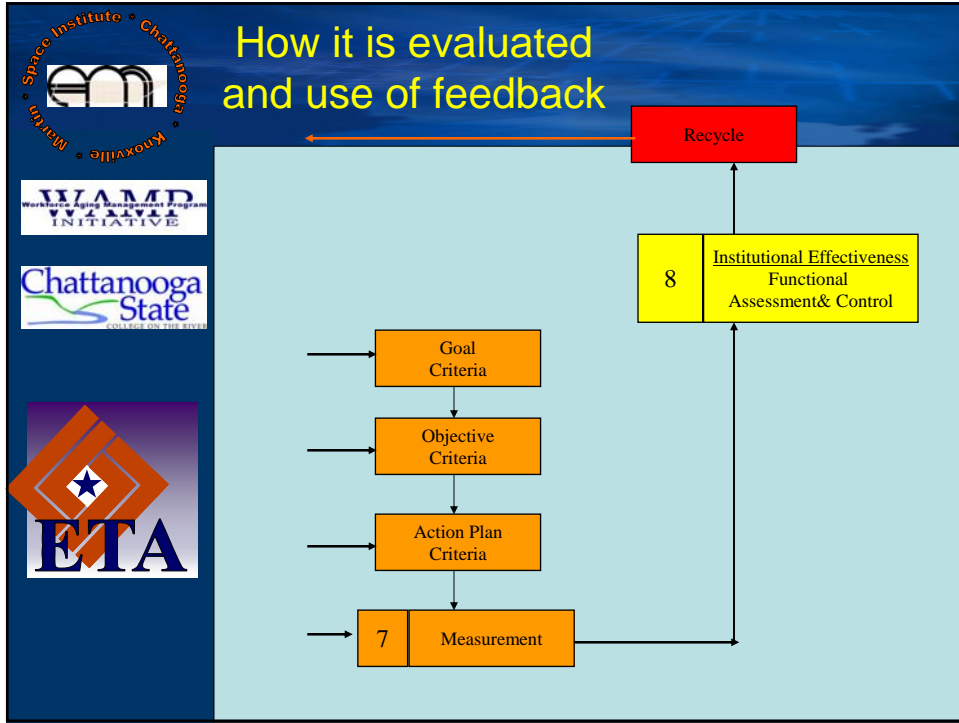
# Operating Plan : Two Portrayals

As an integrated part of strategic planning...



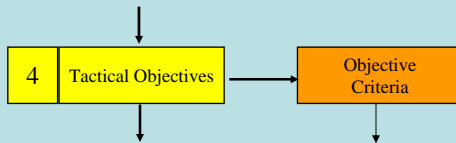
# ... and as a process





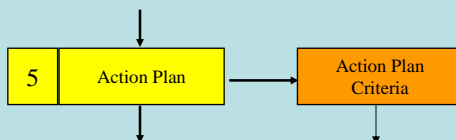
## Annual Evaluation

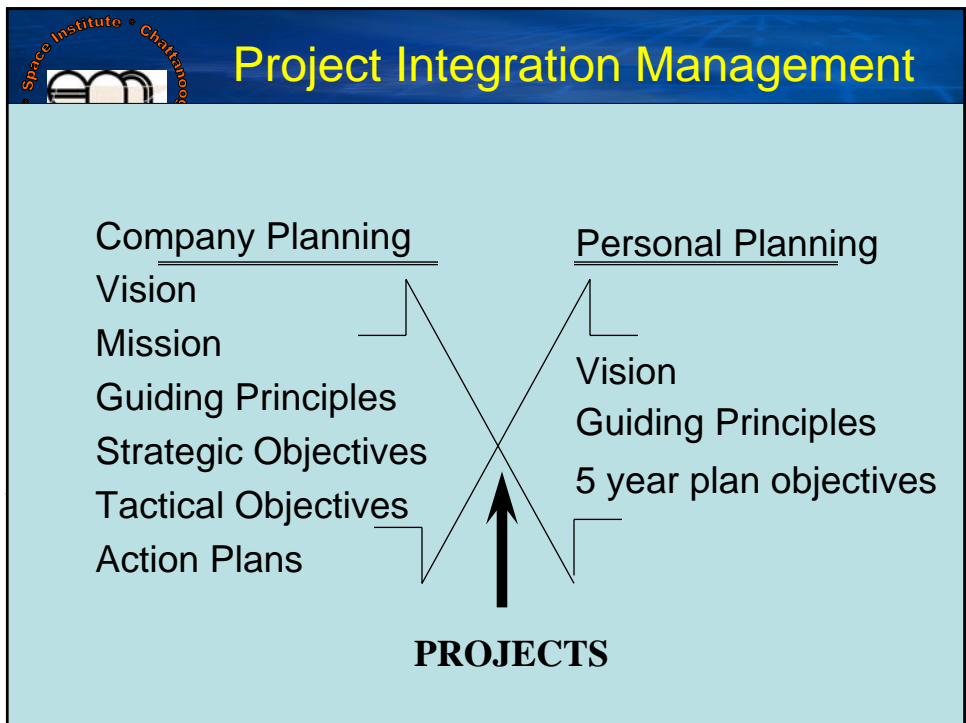
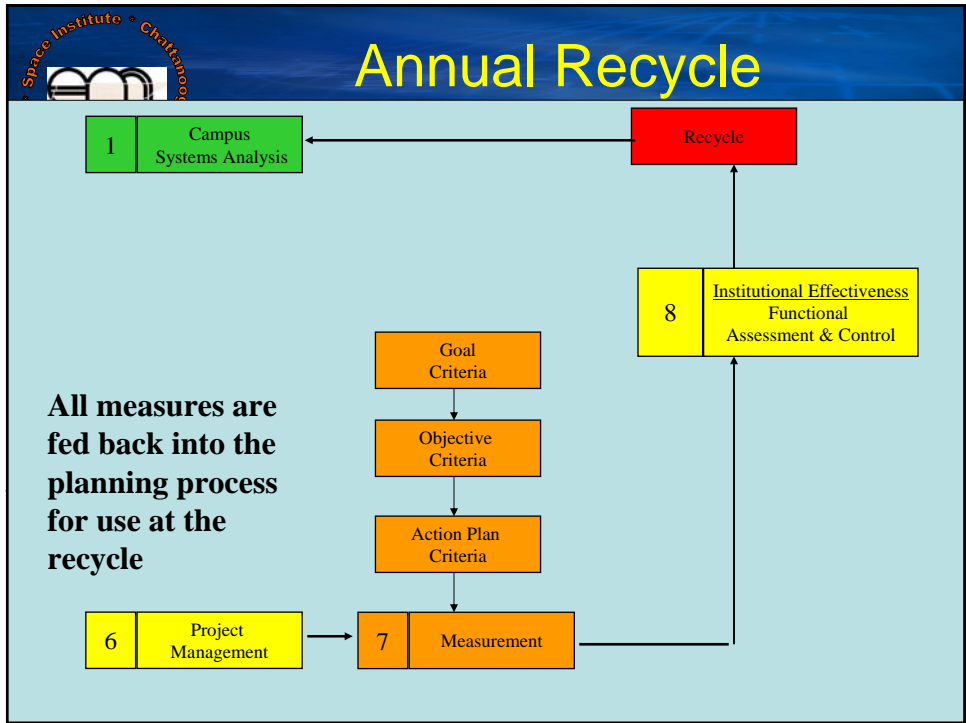
**Shorter term (12 months or less)  
Measurement Criteria are designed and  
collected at this step.**







## Continuous Evaluation

**Each project Action Plan requires a set of  
Measurement Criteria that will be utilized for  
measuring project success and continuously  
improving the process for the next project.**















## Feedback Systems

- How do I fit in?
- What do I do Monday Morning?







## Individual Strategic Plan

- SEE MODULE 1 Time Management





## Design Team Charter

- Team Composition
- Tasking Statement
- Deadline
- Resources for Design

## Strategic Planning: What are the Gems of Wisdom?

Or  
Lessons Learned

## Gems of Wisdom

- One cannot manage what cannot be measured
- Measure to Improve
- Focus on support for performance improvement
- Identify strong forces pushing organizational change






## Additional Gems of Wisdom





- Push decision making to lowest appropriate level
- Identify your New Competition
- Avoid Quick Fixes
- Design Processes
- Don't slap latest tool on poor process
- Compare against New Competition










## Yet more gems

- Create sense of shared purpose
- Measurement & evaluation is constantly evolving
- Link measurement to strategy
- Minimize measurement for control purposes
- You get what you measure





## The Response

- Separate measurement from evaluation
- Develop a blue print for strategic planning

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## Additional Readings

Planning and Measuring Your Organization of the Future, Sink and Tuttle, 1989, IE Management Press, Norcross GA.

Essentials of Strategic Management, Hunger and Wheelen, Prentice Hall, 2007, ISBN-10:0131485237, ISBN-13:9780131485235