



Strategic Planning: *Making it Work!*

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Agenda

1. Welcome/introduction/overview

2. Strategic Planning Explained

3. Strategic Planning Process

4. Tools/Techniques and Tips

4. Question/Answer/Adjourn

"If you don't know where you are going, you will wind up somewhere else."

Yogi Berra



Decisions Decisions!!!



"C'mon, c'mon—it's either one or the other."

What is Strategic Planning

- A systematic, formally documented process for deciding what is the handful of key decisions that an organization, viewed as a corporate whole must get right in order to thrive over the next few years. The process results in the production of a corporate strategic plan.

- *Simply Strategic Planning*

Common sense uncommonly applied!

- *Mike Boone*

What is Strategic Planning

- Used by community groups, government departments, organizations and businesses to develop blueprint for action and change
- The process should be community based, inclusive and participatory to allow for maximum stakeholder involvement and input.

Benefits of Strategic Planning

- Defines mission, vision & values
- Establishes realistic goals, objectives & strategies
- Ensures effective use of resources
- Provides base to measure progress
- Develops consensus on future direction
- Builds strong teams
- Solves major problems

Planning for Results Diagram



Goals for Planning

- Engage a wider network to help translate plans into goals, initiatives and key performance indicators.
- Integrate strategy implementation into the strategic planning process.
- Establish a repeatable and recurring strategic planning process for the organization.
- Evolve skills, processes and readiness for using measurement & data analytics.
- Synchronize with mandated program requirements (e.g. ROMA).

How Do You Create a Best Future?

“The world we have made as a result of the level of thinking we have done thus far creates problems we cannot solve at the same level of thinking at which we created them” – Albert Einstein

The Blame Game

1. Ignore/Deny
2. It's Not My Job
3. Finger Pointing
4. Confusion & "Just Tell Me What To Do"
5. Wait & See
6. Cover Your Tail

People get focused on what they can't do & set their sights on the obstacles rather than on the results they need to achieve.

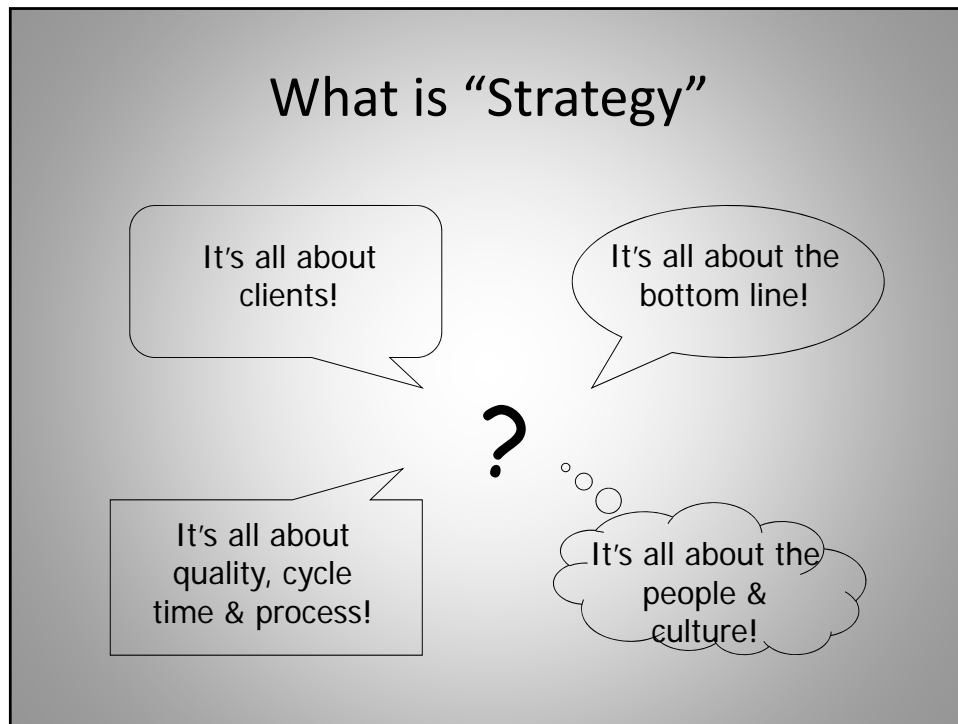
Two Approaches

Deficit Focus

- What to fix
- Discuss problems, symptoms, causes, solutions, action plan, intervention
- Breaks things into pieces & specialties
- Assumes organizations are constellations of problems to be overcome
- Slow! Takes a lot of positive energy to make real change.

Strengths Focus

- What to grow
- Discuss the true, good, better, possible
- Considers the best patterns of the whole
- Expands and aligns vision of preferred future.
- Assumes organizations are sources of unused capacity and imagination
- Creates new energy fast.



What is Strategy?

- “Strategy is about selecting the set of activities in which an organization will excel to create a sustainable difference [value] in the marketplace.”
- “Differentiation arises from both the choice of activities and how they are performed.”

(From Michael Porter, *What is Strategy*, Harvard Business Review, 1996)

Strategy vs. Operational Effectiveness

Operational Effectiveness

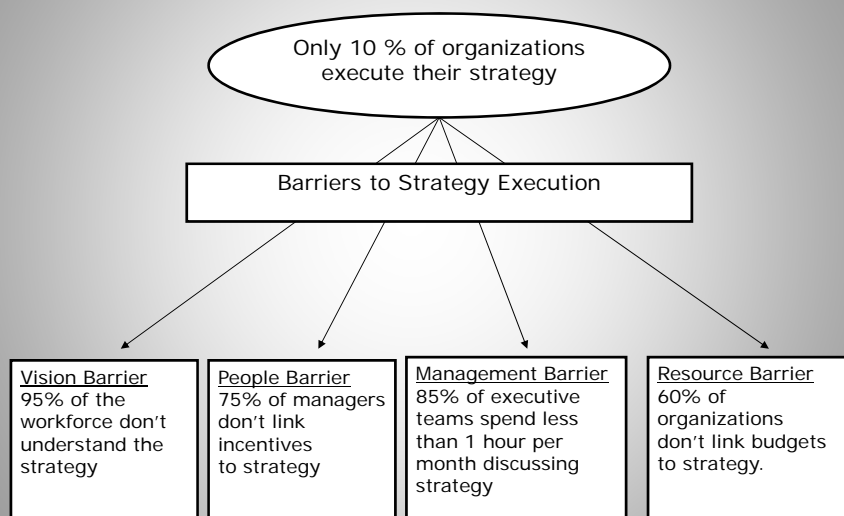
- Doing the same things better
- Best practices
- Leads to competitive convergence
- Just doing this doesn't lead to success.

Strategy

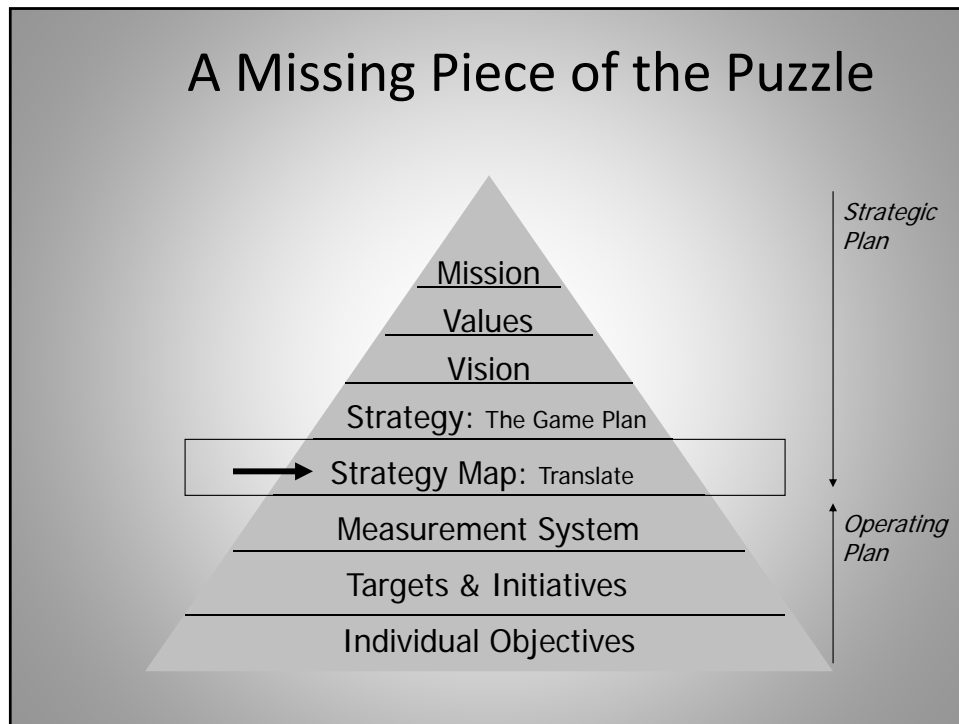
- Choosing to run a different race
- Being unique in delivering value to your chosen set of constituents to meet their needs

- ▶ *BOTH are essential*
- ▶ *Measures for each are different*
- ▶ *The challenge: How can they reinforce each other?*
- ▶ *Requires strong leadership, clear purpose and well-defined measures*

The Strategy Execution Challenge



A Missing Piece of the Puzzle



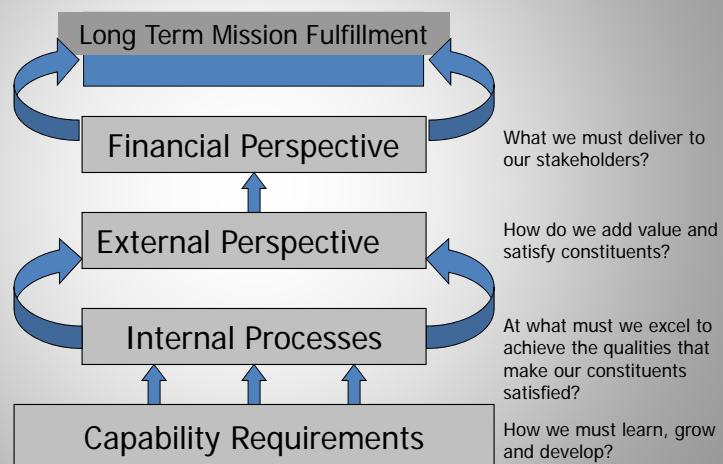
Tools!!!



A Strategy Map is...

- A way to describe the link between results we want to achieve, internal processes that create and deliver the results, and the intangible assets we need to operate the processes.
- A one-page visual picture of cause-effect linkages that drive implementation.
- A context for making to operational decisions and managing performance.

Strategy Map Framework

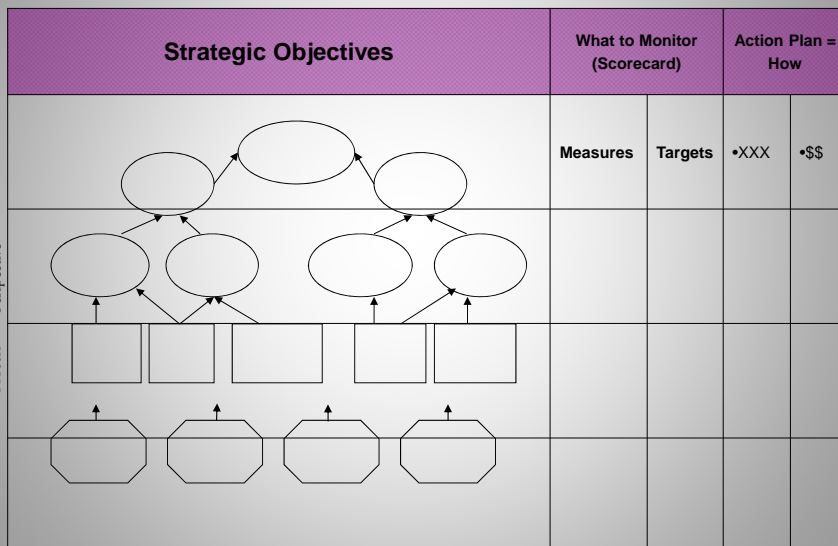


Second Half of Strategy Mapping: Implementation Blueprint

- **Scorecard: What to Monitor**
 - Establish measures & targets
 - Select initiatives
 - Allocate resources
- **Roadmap: How to Get There**
 - Timeline
 - Milestones
 - Accountability

The Scorecard and Roadmap ensure that strategic objectives are more than statements of intent.

The Complete Picture



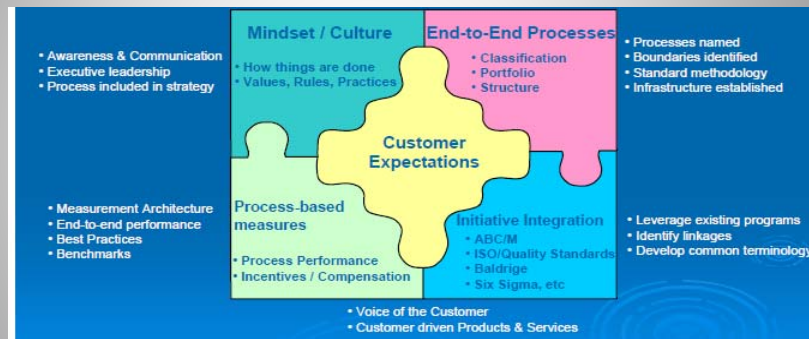
Example Scorecard

Strategic Theme: Internal Product Development

	Strategy Map	Objective	Scorecard		Action Plan	
			Measure	Target	Initiative	Resources/\$
Financial Perspective	Revenue Growth	Grow revenue from new products	% revenues from new products	30%	• Deliver Product X by__ to ____.	• \$\$\$
External Perspective	Innovative Products	Satisfy needs for state-of-art capabilities	Share of account	40%	• Gain sharing program	• \$\$\$
Internal Process	World Class Internal Product Dev't	Accelerate new product development	Time to market	9 months	Reeingineer Dev't cycle time	• \$\$\$
Capability	Stable High-Talent Workforce	Acquire, develop, retain ____ skills	Key staff retention	95%	• Supervisor Training • Benefits program	• \$\$\$ • \$\$\$

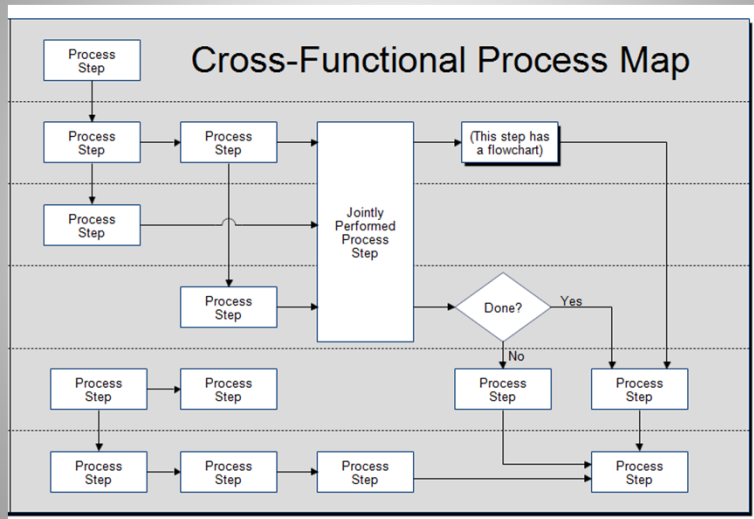
Process Based Management

A holistic management approach that focuses on:



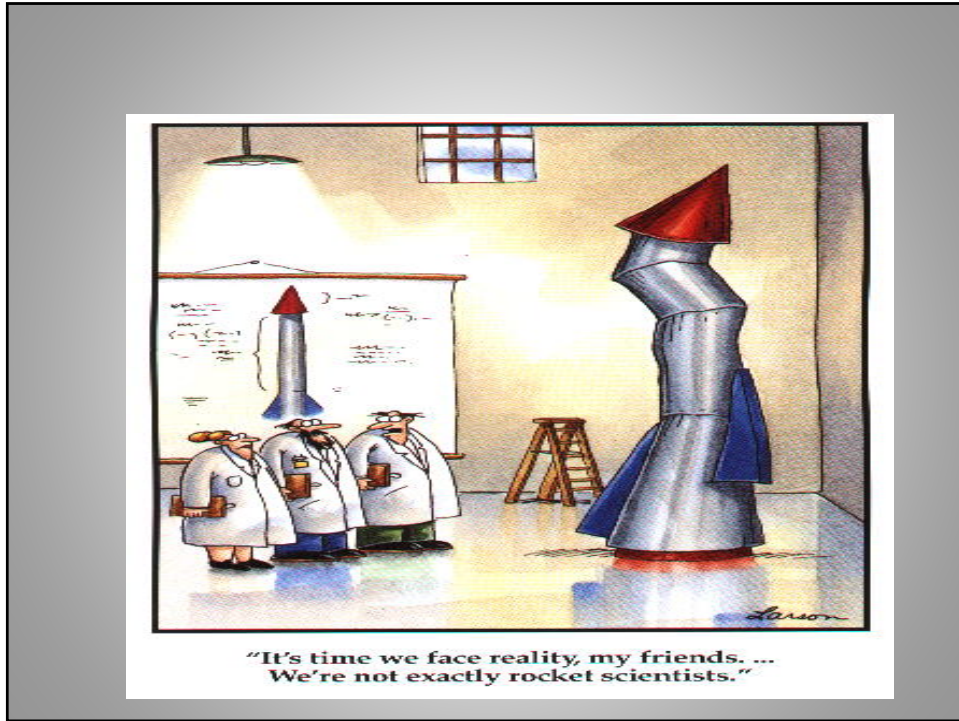
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Sample



Putting it all Together!





Questions???

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