

Don't Waste Time Planning

A simple path to unleashing your team's power to shape the future

JACKSON **KELLY** PLLC



What we will talk about

- Defining strategic planning.
- How most organizations plan.
- Sensible Strategic Planning Process.
- The importance of a facilitator.
- Planning in times of great uncertainty.

What is strategic planning?

- Planning is simply understanding where you are, determining where you want to be, and stating how you are going to get there.
- Done well, it can be so much more

What planning should do

- Foster understanding
- Encourage imagination
- Open communication
- Forge consensus
- Energize the team

There are many planning methods

- Process over results
- Written plan over discussion
- One size fits all
- Excessive detail obscuring the point
- Planning treated as an event

6 traits of strong strategic planning

1. Addresses the critical issues of existence
2. Ensures all voices are heard
3. Creates a shared understanding of where we are

6 traits of strong strategic planning (Continued)

4. Forges consensus on why we are here and where we are going
5. Establishes a path for further conversation
6. Energizes the team with a shared sense of purpose

Most groups take one of three paths

- Board dictated planning
- Management prepared planning
- Avoidance

There is a better way

- Keep it simple
- Stop looking at planning as an event
- Treat planning as a conversation
- Focus on questions not answers

Sensible Strategic Planning Principles

- The process should be simple
- Focus more on the questions than answers
- Let everyone know where the process is going
- Focus the on our unique issues
- Bring all the important voices to the table

Sensible Strategic Planning-- Preparation is key

- A good facilitator is essential
- Review financial reports, prior plans, and value statements
- Consult with key leaders to shape the planning session themes
- Survey the participants to gain insight on key issues
- Prepare a detailed agenda and presentation

Sensible Strategic Planning-- The planning session

- Present the results of financial analysis and survey responses (Where are we?)
- Ask the existential questions (Why are we?)
- Commit to a clear direction (Where are we going?)
- Discuss what the group is willing to do (How do we get there?)

Sensible Strategic Planning-- The planning session (Continued)

- Facilitate an open discussion, ensuring everyone is heard
- Summarize the key points of the discussion
- Discuss how the conversation continues

Sensible Strategic Planning--

The follow up

- Prepare a short planning statement that defines the selected strategic direction and key objectives that must be addressed to achieve the strategic direction.
- Negotiate the responses to the key objectives
- Follow up on a regular basis and hold each other accountable

Benefits of an outside facilitator

- A good facilitator can help make the best use of your valuable time
- Experience in guiding planning discussions
- Focusing the discussions when they wander
- Asking the unaskable questions
- Offering an outside perspective

Planning in times of great uncertainty

- The most important time to plan
- Focus on what is happening to your stakeholders
- Build alternative narratives supported by alternative assumptions
- Monitor the alternative assumptions

Planning is an opportunity to bind an organization together

- Don't waste the time you have together
- Make planning a cooperative, energizing and inclusive process
- Continue the conversations

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