Strategic Planning Is Dead. Don't Do It!
(Create an "Agenda of Work" for Transformational Change Instead)

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Dr. Phil McGraw, TV's prolific talk show host, often asks "Well, how's that working for you?" implying that his guests should do something different if they expect a different outcome. If I asked you how your strategic plan was working for you, how would you answer? Sadly, many say "not so much." Some say that they don't have a plan because plans have no value. Others argue a plan doesn't exist, because they can't relate to it. Let's face it, strategic plans fail because they don't produce the transformational change we want and need them to. Strategic planning is dead and we should simply admit it and do something different.

Ask yourself the following questions.

1. **Does your company have one or more goals or initiatives that didn't get accomplished or meet your expectations over the last year?**
2. **Are you or others frustrated because you "can't get to" certain things that are critically important to the sustainability of your organization or "you can't afford it?"**
3. **Are you or others frustrated because you never seem to deal with "the elephant in the room?"**

If your answer to any of these is **YES**, then your organization is "stuck" and your planning process is ineffective. The best thing that you can do is honestly evaluate your current situation, determine what's not working and create an "action plan for change." In our experience, all strategic plan "failures" can be attributed to one or a combination of the following factors:

• Lack of understanding of what it takes to "get to the next level"
• Implementation plan is unrealistic or non-existent
• Investment, return on investment and impact are not quantified so the required investment(s) are never made
• No case for support is articulated so fundraising is hard or non-existent
• Lack of buy-in and alignment between and among board members, management, staff, funders and other stakeholders
• Lack of capacity and technical skill (capability); most often the skill gaps are project management and dealing with naysayers who will intentionally or unintentionally "thwart" the implementation process
• Blaming one or more individuals for lack of performance without recognizing the root cause "systems" issues that impact performance
• Inability to admit that one or more of the above is a problem and getting help to work through it

The biggest challenges are the last two, because many seek to place blame if something is not working perfectly, without understanding the factors that affect performance, including their own contribution. This is especially true in communities, alliances and mergers where collaborative work across disciplines, sectors, municipalities and agencies is more challenging because of language, cultural and management style differences.

If you are stuck, conducting an evaluation by

getting "outside perspective" from an organizational development or change management specialist (such as Strategy Solutions) can help you more quickly identify stuck places and create an action plan to move forward. Your "planning" process should include all of the following:

- Create an environment where people can be honest about individual and collective performance without excuses, defensiveness, or fear of retribution so they can work through issues to resolve problems without "taking their marbles and going home."
- Ask questions; listen, understand and articulate the vision locked inside people's heads.
- Synthesize and distill vision elements into a "shared vision" through discussion and dialogue.
- Engage stakeholders through effective outreach, inquiry, data collection; effectively summarize data to draw conclusions about stakeholder needs and expectations to shape new programs and products.
- Create commitment to action through consensus building; identify, vet and address legitimate concerns; challenge and minimize fear that is rooted in false assumptions.
- Translate vision into action by identifying specific human, capital and operating resources required to achieve tangible outcomes; provide assistance to staff members who don't know how to do this (many don't!).
- Assess the capacity and capability of individuals and teams to accomplish assigned objectives and identify and fill technical competency gaps to ensure implementation.
- Challenge staff to go the "extra mile" to fill in short term capacity gaps until you can figure out future staffing needs and redesign work or justify additional investment.
- Identify root causes when teams feel "stuck;" clarify roles and accountabilities, resolve conflict that occurs and facilitate action to get "unstuck."
- Sequence strategic investments; develop a case for support for investment through cost/benefit analysis and seek needed resources.
- Rewrite job descriptions to include accountabilities and expectations.
- Revise performance evaluation systems, including outcomes and impact.
- Create an agenda of work for each board committee that supports management's action plan.

This seems like a lot of hard work that takes a lot of time, but skipping one or more steps results in muddling. You will waste more time and money on the wrong things, without substantive change. A process that effectively incorporates these strategies is more likely to result in transformational change, than a bunch of strategic planning meetings discussing "SWOTs and priorities." SO DON'T DO IT!

Debra Thompson is founder of Strategy Solutions, an organizational development firm with the mission to create healthy communities. For over 20 years, Debra and her team have provided research, planning, training and project management support for organizations and communities who want to grow and thrive. She is an adjunct faculty member in the Duquesne University Master of Organizational Leadership program and is a consultant, trainer and peer reviewer for the Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector. She can be reached at 8425 Peach Street, Erie, PA 16509; 814-480-8000; or through her website at getstrategy.com.

Founded in 1998, Strategy Solutions, Inc., is dedicated to facilitating creative solutions to ensure the sustainability of public, private and nonprofit organizations and create healthy communities.

Our unique process of combining analytical research capabilities, group process techniques, and planning tools blended with enthusiasm, energy, and total dedication to each client's success has resulted in hundreds of clients who have achieved remarkable outcomes.

Our projects and clients have been recognized as best practices by the PA and NY Departments of Health, PA Department of Education and Welfare, the US Department of Health & Human Services, PA Partners, MD Workforce Development Association, and the International Economic Development Council. We are certified as a Women's Business Enterprise in PA, WV, VA, GA and FL.

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