



Better Strategies

by Bob Whipple, MBA, CPLP

In my leadership development work, I am often called upon to help organizations with their strategic plans. The process is well known, and numerous facilitators are qualified to help organizations work through the process. This article outlines some of the mistakes I see organizations make and shares a typical "Strategic Framework" that I find very useful.

The typical mistake made by well-intended managers is to overdo the strategic process until it becomes an albatross rather than a means to focus effort. Here are seven signs that a strategic process is too complex.

1. Too many strategies

The idea of a strategic plan is to focus effort on the vital few tasks and put less emphasis on the trivial many. If the end product of a strategic plan is 23 different strategic thrusts, it is way too complex to be useful, even for a large organization. I urge teams to try to identify three to five strategic thrusts at any given time. The idea of having a "handful" of strategies is appealing because the total effort does not look or sound overwhelming. Sometimes groups will have six strategies, but more than that is going to get some pushback from me.

2. Too many meetings

A typical mistake is to set up sub teams and have a series of standing meetings to deliberate on the elements of the strategy. This process sounds logical, but it easily becomes a huge activity trap. I witnessed a college set up numerous strategy teams. They slaved in long meetings for over 18 months. When the strategy tome was issued, it resembled the IRS Tax code. There were so many details and overdone objectives that the entire effort basically sank under its own weight.

When I work with groups, I try to get the entire strategy completed in one or two sessions (usually several hours each), and the documentation fits on the front and back side of a single sheet of paper.

The trick to getting the most accomplished in the least amount of time is preparation. For example, I have the group vote offline ahead of time on candidate values from a list of about 50 possible ones. In the meeting, it is a simple matter to ratify the desires of most participants because the data is already available. There is always the ability to go back and redo the strategy at a later date if things need to be added. The mistake many groups make is trying to get the document perfect at the outset.

It has been said that a camel is a horse designed by a committee. Be careful to not make the strategic process into a series of social events or public debates. The job of creating a strategy can be streamlined without sacrificing buy in. One way to check if you are overdoing the number of meetings is to watch people's eyes when you announce a strategic planning activity. If their eyes roll back, that is a good indication you are making the process too complex.

3. Wordsmithing

For some inexplicable reason, people see a compelling need to have the wording of things like mission statements be perfect and embraced fully by everyone. I think mutual buy in is laudable, but if you drag out the discussion of every word of every sentence until all parties are thrilled, the ship will sail without you. I have witnessed long passionate arguments by managers about whether to use "and" or "and/or" in a mission statement. Once the thing was finally cast in concrete, there was so much acrimony that the parties simply put the product away and forgot about the whole exercise.

Use the Pareto Principle when contemplating the wording. If we can agree on 80% of the concept, then we can have someone generate a straw man document offline and not tie up the entire group.

4. Confusing Tactics with Strategies

For every key strategy, there will be some tactics that allow achievement of the objective. Strategies are broad areas of focused effort that help an organization move toward its vision. Tactics are operational activities that collectively allow the strategy to be achieved. Strategies are the "what," and Tactics are the "how." Often groups put the "things to do" as the strategies rather than call them tactics. A trained facilitator knows how to avoid this pitfall.

5. Not including Team Behaviors

Many facilitators leave out this critical step. Teams need to have a set of expectations for the behaviors of team members. Reason: without specific expectations it is difficult to hold each other accountable for accomplishing the tasks. Strategies become a wish list of good intentions rather than high energy areas where we are truly going for the gold.

6. Inappropriate Measures

For every strategy there needs to be at least one measure, preferably more than one. There are two common problems with measures: 1) they can be activity traps where getting the data is way too burdensome, and 2) If set up incorrectly, measures can drive the wrong behaviors. Make sure the measures you establish are encouraging people to do things that truly do lead to fulfillment of the strategy.

For example, one group had a strategy to increase revenue. The measure they selected was number of sales calls. The sales force was only too happy to increase the number of sales calls in order to earn more bonus money; unfortunately, the added activity meant they were less effective at closing sales, so total revenue actually went down. The measure looked good, but the goal was not realized.

7. Failure to communicate the strategy

It is a crime that many groups pour energy into creating a nice strategic plan that then sits in the desks of the managers for years and is not operational in the everyday world of work. The documentation of a strategy is pointless unless it becomes active in the hearts and minds of every single person in the organization.

Leaders need to discuss the strategic elements continually and explain to people why their actions are consistent with the plan. For example, a leader might say, "We are putting on a third shift next month because our vision for growth cannot be achieved without a fully loaded factory, which is the number one strategy in our plan."

I have developed a simple format for a strategic plan that works for most groups. It is appropriate for profit or non-profit organizations of all sizes. The document can be constructed in a day or two with the right preparation effort, and it really helps focus the activities of a group after the strategy is completed. I usually show the elements as two sides of a single sheet of paper, and I laminate it like a large card so it can be passed around without getting mangled. I personally prefer the single sheet of paper over the posters in the conference room. I believe it has more power.



PURPOSE

To create greater peace

VISION

The world will be a better place
Because of the products
We make and the services
We render

MISSION

We seek to drive out fear
And replace it with love



Team Specific Graphic

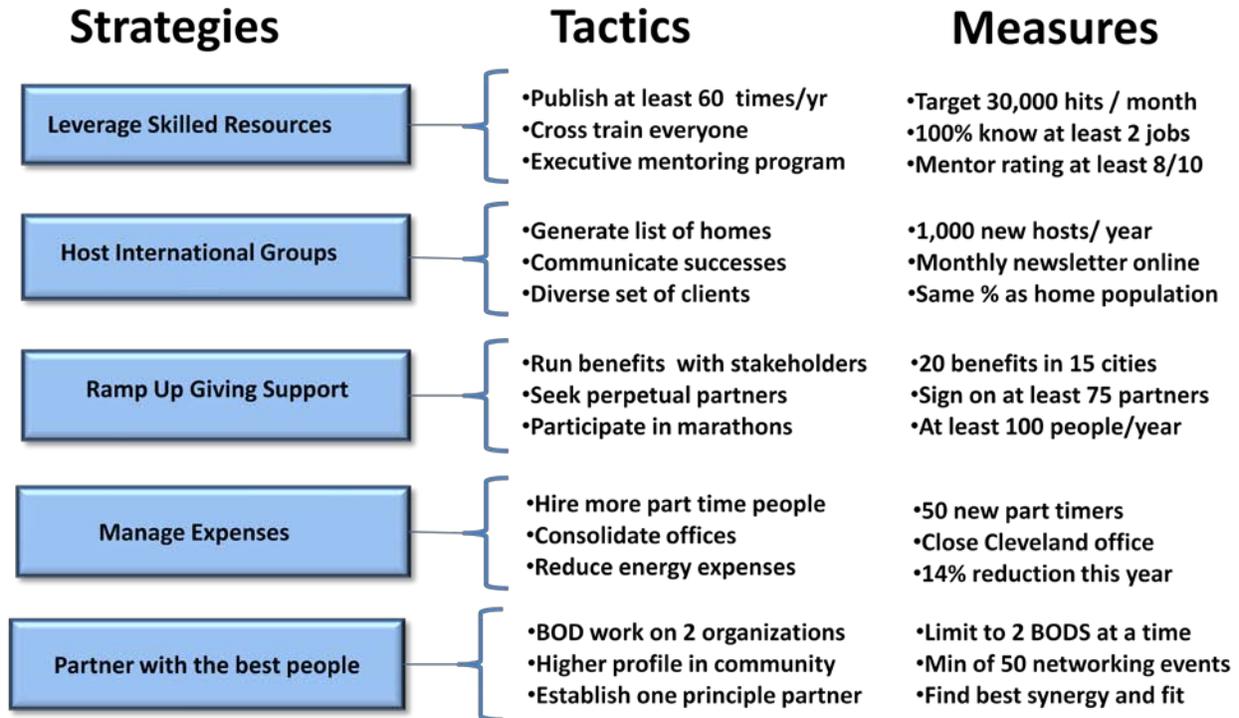
COMPANY VALUES

1. Trust
2. Integrity
3. Simplicity & clarity
4. Service oriented
5. Appreciate other views
6. Make positive contributions

COMPANY BEHAVIORS

1. We help others first
2. Look for the good in people & reinforce it
3. Respond to people the same day
4. Go the "extra mile" to help others
5. Find positive value in all interactions (even disappointing ones)
6. Give best value in every interface
7. Model outstanding teamwork skills
8. Proposals out within one week
9. Stay on task

Strategy Document - 2013



There are many different formats for strategic plans; the one above is my favorite because it conveys a lot of information in a small footprint. Whatever format you select, make sure it is user friendly to the people who need to internalize the strategy. The most important objective for strategic work is to focus energy, so avoid the mega process that seems to go on forever, and make your plans crisp and beneficial.

Bob Whipple, MBA, CPLP, is a consultant, trainer, speaker, and author in the areas of leadership and trust. He is the author of: *The Trust Factor: Advanced Leadership for Professionals*, *Understanding E-Body Language: Building Trust Online*, and *Leading with Trust is Like Sailing Downwind*. Bob has many years as a senior executive with a Fortune 500 Company and with non-profit organizations. For more information, or to bring Bob in to speak at your next event, **contact him at** www.Leadergrow.com, bwhipple@leadergrow.com or 585.392.7763

