

Strategic Jargon

by Bob Whipple, MBA, CPLP

Does your strategic plan clarify or complicate? When organizations do a strategic plan, a bunch of specific words are used to describe the various pieces, but you would be surprised how those words are often used incorrectly. This problem fascinates me, because I do a lot of strategic work with corporations, not-for-profit groups, and educational institutions. I also teach strategic thinking at two universities. One cure for confusing strategic plans is to use the jargon correctly.

For example, it is common to have the mission and vision statements mixed. I have written about that problem and given some typical examples in another article entitled "Mission and Vision Essentials." Another common sticking point is getting the strategy separated from the tactics. Strategy is the overarching way you are going to move from the current situation to the vision, and tactics are the detailed actions you will take to accomplish the strategy.

Most facilitators have an order they prefer when helping groups with strategy. I believe it is not essential to have a rigid pattern, but I generally prefer to start out with the values. Reason: Values are a kind of foundation upon which the other elements rest. To me, putting values late in the process feels like digging the foundation after the house is already constructed.

A key element in most strategic work is a SWOT analysis. SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. This work is the basis for determining an intelligent strategy. It consists of two views of the organization. In the first view, we look through a "microscope" at the internal strengths and weaknesses of the current organization. The second view is looking through a "telescope" at the environment around the organization to determine the opportunities and threats.

The SWOT analysis can be a time consuming and very boring process. It does not need to be. Facilitators can move through this exercise by breaking up a large group into four subgroups for the exercise. The use of creative techniques, like giving a prize for the

most novel idea, can keep the atmosphere light. Of course, like in any brainstorm activity, it is essential to have a "safe" environment where the ideas are just captured, but not critiqued during the session.

One technique that I like to use is a "two wave" approach to the ideas. Let's suppose we just completed a 10 minute discussion of the "Opportunities" part of SWOT. I then will say something like this, "That is a really great list of opportunities. We could stop here, but I want to challenge the group. Most of these ideas came quickly and were from the top of your minds. I am sure there are additional creative and dynamite ideas still lurking in the corners of your brains. Let's take another 10 minutes and see if we can double the number of opportunities on our list." That process brings out some highly creative ideas, because all the obvious ones have already been mentioned.

I do not use this technique for all sections of the SWOT, as that would get old. It works best for the opportunities section.

After doing a SWOT, it is possible to identify the overarching strategy and tactics. A mistake made by most organizations is to have too many strategic thrusts in the analysis. The reason for a strategic plan is to focus effort on the vital few activities. If you have 32 high priority strategies, you will have trouble making much progress. I encourage groups to narrow the analysis down to three strategies: perhaps four.

One additional activity that is extremely important, but often left out by groups, is to document the behaviors we expect of team members. Without specific behaviors stated in advance, it is difficult to hold people accountable for doing them.

I use a story to illustrate what the jargon on a strategic plan means. Sometimes this helps groups focus on the work and not get muddled up in the terminology. Here is a typical story I use for that.

I liken the strategic process to taking a trip. I want to go from New York City to Toronto. My **mission** is to have a safe and enjoyable trip. I am considerate and make sure people on the other end are aware of my plans (**values**). Reaching Toronto is my **vision**; I can see the skyline in my mind.

I now look at my resources: my late model car is a **strength**; the fact that the tires are almost bald is a **weakness**. I see on the map there are some excellent highways (**opportunities**) but also there is some potential bad weather on the way (**threats**). I need to select the route and timing wisely.

I decide which day to leave and the route to take (**my strategy**). The **plan** is to stay in Toronto three nights, because I have two days worth of business to conduct. My **goal** is to drive there in 10 hours. I know it is not possible to get there in 9 hours, and I am

willing to accept up to 12 hours if there is construction or other delays. There are **contingency** plans associated with **potential problems**.

Then I figure out what things to pack, decide what time to leave, and buy two new tires(**tactics**). I monitor my progress and determine my gas mileage along the way (**measures**). For example, I know it is necessary to reach Buffalo by 1 pm to make my timing goal. I drive within the speed limit, am courteous to other drivers, and I stop frequently enough to not get over tired (**behaviors**). I have a very good chance of having a good trip, which was my original **mission**.

Now if I can only get those SOBs in Toronto to sign my contract, I will be fine. Hold on a minute; maybe that is worth some planning as well. Maybe my **vision** in the first place should have been more about a signed contract than about seeing the Toronto Skyline. For that, I need to make sure my **strategy** achieves the **true purpose** for the trip, and make sure all parts of the plan **align** with that **objective**. In this case, I would have been wise to state the **vision** was to get a signed contract, and the trip to Toronto was one of the **strategies**. Now my **strategic plan** would stand a better chance of getting me what I really need.

The process of creating a strategic plan is fairly straightforward, yet many groups get tripped up with all these strange words, and come up with a plan that looks good on paper but does not work well in the real world. That is a colossal waste of time. Make sure you have someone who knows what he or she is doing lead the activities when creating your strategic plan.

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**

