



Co-creation

Wisdom from wherever

Planning Planning

If you are working on a strategic plan, consider asking these five questions:

- Is your plan aligned with the organization's vision, values and competencies?
- Is it based on current data?
- Does it anticipate possible shifts in the landscape?
- Are actions and options prioritized and scheduled?
- Is it packaged in a clear and concise document?

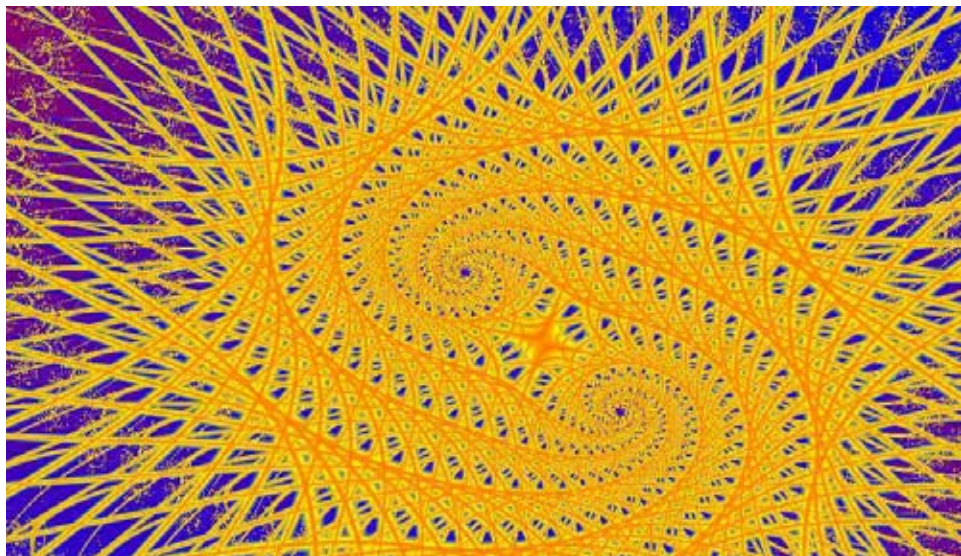
There are many things that people can and do say about strategy formulation, and to be honest, I'm not sure how useful much of it is. Organizations are so different and operate in particular contexts, especially across sectors.

Some articles about strategic planning exhort the leader or manager to do this or that, for example, to be bold, to engage a lot of stakeholders, or to look at best practices. Of course there's nothing wrong with boldness, engagement, or following best practices. But again, I suspect those kinds of exhortation are not terribly helpful.

These five questions above address five basic concerns, and I think it would be hard to argue against any of them. That said, getting a robust plan completed is hard work because each of the five questions takes

Spinneret

Fractal art is a two-dimensional representation that is limited by our resolution at that level. "Real-life" fractals – or fractal-like behaviour – are invariably three dimensional, and we have ways of perceiving different levels of scale at the same time. We can for example see an individual in the context of their organization, community and society pretty much all at once.



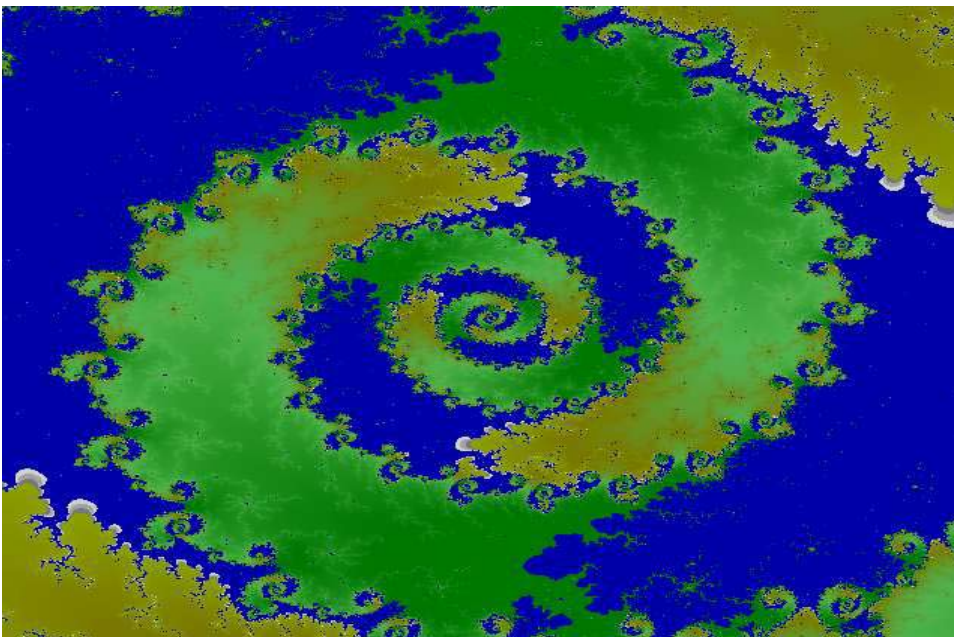
time and effort to answer well. For smaller organizations, especially, the task is daunting. For any organization, developing a robust strategic plan can be costly. So I'd like to suggest some ideas to streamline your strategic planning process without sacrificing any of these five qualities.

Aligning the plan with vision, values and competencies

- Articulate a vision and values once, and then leave them be for at least three years. Done properly, they should stand the test of time.
- Find applications of the vision and values on a day-to-day basis. They should represent the benchmarks for everything you do. By referring to them often and deliberately, they become part of your organization's DNA.
- Use Appreciative Inquiry to base your plan on your core competencies. The cornerstone of the AI approach is usually a question that elicits the best of what you are as an organization. In a well-facilitated day with a broad set of stakeholders plus a day or so of editorial effort, you can draft an exciting plan fairly quickly.

Vision, values and competencies test the appropriateness and do-ability of a strategic plan. You can generate ideas from them, as described above, and you should be referring back to vision, values and capacity periodically in your planning process.

Getting these five fundamentals right does not preclude a bold or creative strategic plan. In fact, getting current data and examining possible scenarios is likely to provoke a good amount of creativity.



Topology

This fractal image clearly shows how some structures repeat at different levels of scale. These are analogous to the operating assumptions – vision and values, mainly – that guide both individuals and the organization or community as a whole.

(I also like how it looks like a map or aerial photograph.)

Untitled

Hard to believe this is not a photograph of something “real” but just a set of computations repeated many, many times.



Find ways to use the many eyes and ears that you have in your organization.

Basing the plan on current data

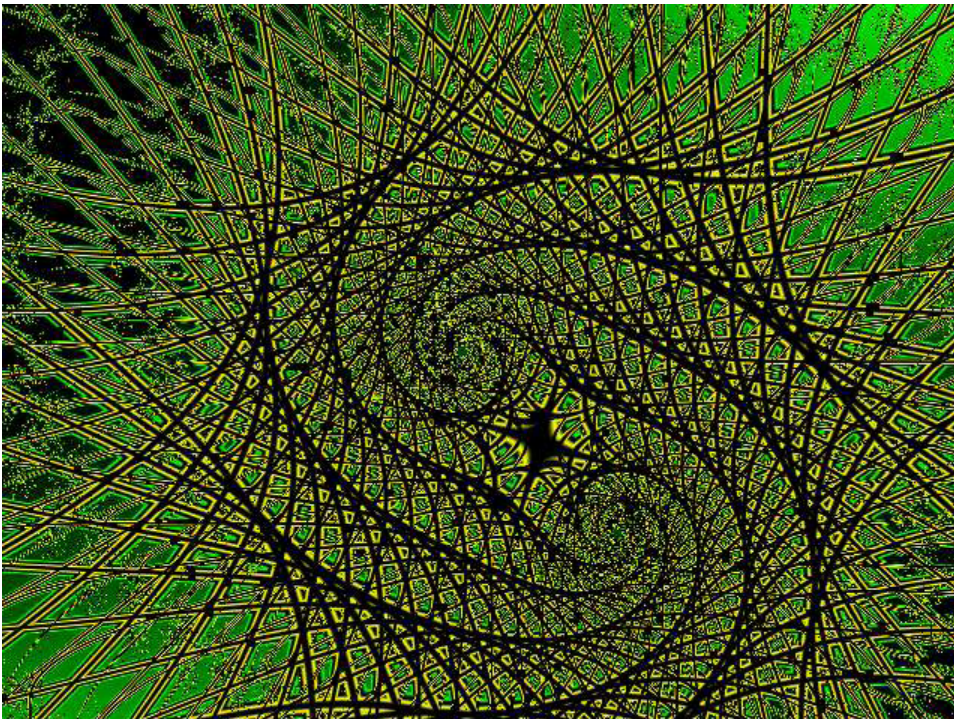
- Have a continuous learning plan for each staff person and board member. This is somewhat different from professional or skill development. To ensure your organization is staying in touch, each staff person needs to connect with clients and the larger context in a fresh way, regularly. Site visits to client sites – or even to clients of clients – are excellent learning opportunities. How else can we get closer to our customers or clients? This discipline cannot be contracted out – or at least most of it has to stay in house.
- Gather the learning. Periodically, aggregate what people have been learning. This can be a two-hour event every few months or so. Challenge people with questions like, “What changes have you noticed in the past few months?” “What trends are emerging?” or “What is most important for our organization to understand at this time?” World Café is a terrific way to aggregate learning when there are larger numbers of people involved (more than 20). You can contract someone to compile an “environmental scan,” but in most cases the do-it-yourself approach is probably better. In smaller workgroups, an information-sharing question can lead off a regular meeting.

Aim to continuously scan the environment and persistently inject new knowledge into your organization. Particularly in larger organizations, set time aside to aggregate emergent knowledge about clients and their challenges.

Anticipating possible shifts

- Develop the organizational habit of asking, “What else might happen?” Particularly at times when there appears to be consensus, it is good to invite “what if” kinds of thinking.
- Annually, gather a diverse group of imaginative team members to develop potential scenarios. Scenario planning invites people to come up with somewhat extreme cases of how the environment could change. This exercise – which takes at least two days – develops four to six descriptions of what might happen in the environment. Unlike the opportunities and threats sections of a SWOT analysis, scenario planning encourages people to imagine the non-obvious possibilities, and to discern the interconnections between them.

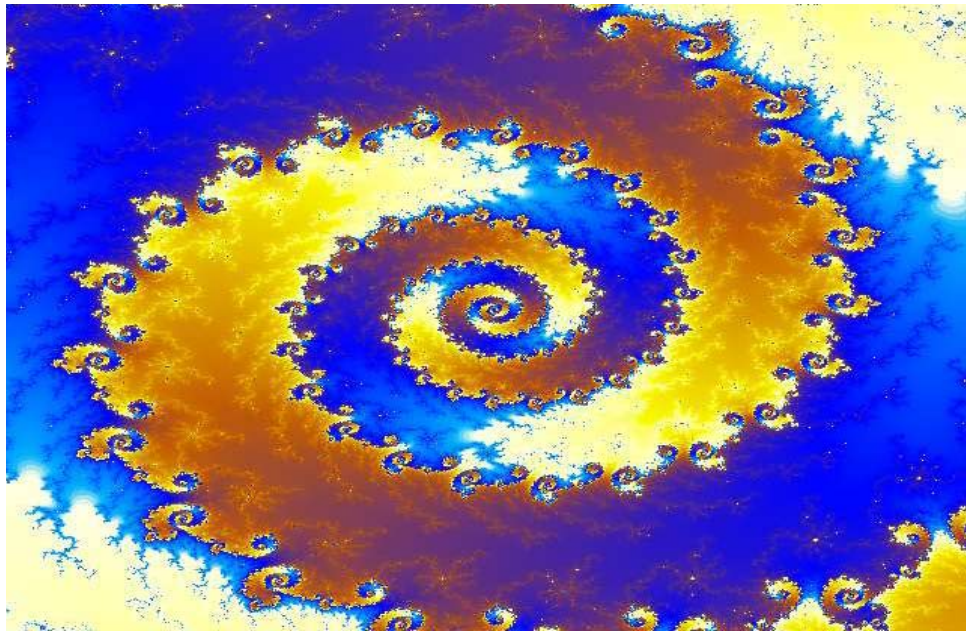
The most profound changes in the life of an organization are usually unexpected. Don't settle for listing all the opportunities and threats people already know. This is a place to encourage imagination, followed by a rigorous approach as to how each scenario is likely to manifest. This process should create options to include in the plan and questions to challenge it. On the intangible level, it will make your organization considerably more responsive and agile in the face of changing circumstances.



Spinneret II

A simple change in colour can shift our perception from the abstract to the natural.

Topology II



Prioritizing and scheduling

- Synthesize the elements of the plan. This is the bread-and-butter of strategic planning – the basic work of prioritizing, scheduling and ensuring that you have the financial, human and other resources to execute the plan.

Listen to external voices as much as internal voices to establish priorities. Clients may be clamoring for a particular change in your service, and you may not be giving it enough importance.

Creating a clear and concise package

- If you don't have the internal staff to distill your plan down to a clear and concise plan, hire someone to help you. If you contract out this work, ask to see a portfolio first – are past examples clear, concise and compelling?

Aiming for a clear document once a year is typical.

In general, the trick is to find the right way to address each of the five questions efficiently. Sometimes a large group, properly facilitated can address one or two in a day. Oftentimes a small team, or even a consultant, is best for the analysis and refinement.

Most importantly, find ways to invite as many staff as possible to be involved in the creation of the strategic plan. When someone sees that they have had a hand in the development of the plan, it shifts how they see the organization and its future.

Every extra page in a strategic plan reduce