

Strategic Doing: Overcoming the Tactical Failures of Strategic Planning

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It's not enough just to have a retreat and write a yearly strategic plan. You have to execute against the plan and turn your ambitious ideas into successful outcomes. Many organizations today write wonderful plans, often with the help of consultants, only to be disappointed with their results at the end of the year. This white paper explains the essentials of organizational follow-through – how your organization can turn your plans into real achievements.

Many organizations today engage in strenuous strategic planning exercises, yet remain unable to experience strategic success. We often hear senior managers tell us, “Our group is great at planning; we just don’t seem to be very good at execution.”

Management gurus preach that the key to success is good planning; if you don’t know where you are going and how to get there, you can never reach your goal. Yet common sense should convince us there is a flaw in this logic. We all know examples of great plans that failed miserably. And, when you read case histories of some of the world’s most successful companies, you find examples of seat-of-the-pants innovation, adaptability, and spontaneity: great success with virtually no planning. The only possible conclusion is that planning is neither necessary nor sufficient for a company to succeed.

Success does not come from making great plans. Success comes from people doing great things. Much more than strategic planning, organizations need **strategic doing**. Many employees who appear not to have engaged in any formal planning are nonetheless fully capable of doing their jobs well and contributing to an organization’s success.

Should we quit making strategic plans? Certainly not – good planning does add value to a management process. Good planning forces us to figure out what we need to do to be successful. As managers tell us all the time, though, having good plans and getting those plans executed successfully are two separate challenges.

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What To Do When the Consultant Leaves

Many organizations use consultants or internal facilitators to lead strategic planning exercises. When the planning exercise is finished, you should have all of this in place:

- A mission statement
- Long-term goals for the organization (i.e., a vision)
- General organizational strategies
- Organizational objectives for the next year

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Collectively, this is your strategic plan. Your strategic planning retreat is over. Everyone is energized, inspired, optimistic. Collegiality and consensus are at a peak. Everyone goes back to work and now the hard part starts – making it all happen.

Your group's success depends on making it all happen at three levels:

1. Strategic management;
2. Department plans; and
3. Individual contributions.

Strategic Management

At the top of your organization, someone needs to provide strategic management. Someone must have the responsibility to oversee execution of the strategic plan. Most groups realize that every major project needs a project manager. Carrying out the strategic plan in order to achieve your company's objectives is certainly a major project; yet many organizations fail to assign a manager for it. If your company has a strategic plan, ask yourself this question: "Who is the manager of our strategic plan?" Can you, and everyone else in your organization, answer that question correctly?

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Ideally, this would be the CEO. In most organizations, though, the CEO is too busy to manage any project, including this one, and the CEO is better considered to be a project resource. In this common situation someone else in the organization should be appointed as the strategic plan manager.

The Organization Must be Synchronized

While you did your strategic planning, your consultant may have referred to the term "strategic alignment." The idea is to get every individual, every work group, and every manager focused on the same strategic targets. The organization gains a multiplier effect on its energy when all its elements are aimed in the same direction, each reinforcing every other.

This does not simply happen. Synchronicity depends on the strategic plan manager having broad oversight of everyone's activities, the ability to set priorities, and the authority to enforce consistency. This does not mean the strategic plan manager needs to be autocratic and all-powerful. Better by far that the manager is a skillful leader who can create consensus and build camaraderie. Unless the manager has the ability to focus everyone on a single vision of success and keep the team working together, portions of the team are likely to splinter apart after the initial planning session and strategic alignment will be lost.

How about your organization? Does your strategic plan manager have the skills and authority to ensure strategic alignment? Are the components of your organization working harmoniously toward shared goals?

Plans Must be Dynamic

It is hackneyed and cliché, these days, to say that nothing is so steady as change. We should be surprised then, when companies make strategic plans for a year or more at a time. Look at your company's strategic plan (if you can find it on your shelf). When was it written? How frequently has it been updated?

Contemporary organizations operate in a dynamically changing environment. If your plans are not dynamically changing, then they are becoming dynamically obsolete.

Each day, your group's leaders, workers, and customers learn more, experience more, and change their expectations. Each day, their ideas about how you should plan to achieve your objectives should be better than they were the day before.

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The strategic plan manager should not set your plan in stone and guard it from corruption. Rather, he or she should guide the plan's growth and evolution in an orderly, constructive manner. Every plan is merely a means to an end. The end – the objectives your organization is trying to achieve – is unchanging, but not the means of getting there. The strategic plan manager's job is to make sure everyone keeps site of the objectives and synchronizes their activities to achieve those objectives.

Here is a question that often discriminates between companies that succeed and those that can only make plans. Look at the status reports in your company. Do your status reports focus primarily on planning elements (e.g., budgets and deadlines) or on achievement of objectives (i.e., what got done and how good it was)? Is it more important in your culture to stick to your plans or to achieve a high-quality result?

Department Plans

If the strategic plan manager is the nervous system that coordinates all the body parts, and the employees are the organization's hands and feet to do what needs doing and take you to your destination, then the departments are the organization's vital organs. The departments work together in organic harmony, each fulfilling its major function (recruiting, fundraising, service provision), working collectively as a single holistic body.

Departmental interactions are critical. Like a human body regulating the intake of food and oxygen, the flow of blood and energy, and the processing of information from the senses, each department must give and take with perfect alignment. When this works well, the result is a perfectly tuned organization; when it fails, the organization is disabled and unsuccessful competing in its marketplace.

Once the organization lays out its strategy and yearly goals, each department figures out how it will contribute. Managers work from the overall goals, apply specific strategies, and create plans that will take them to their departmental objectives.

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And this is where it happens. Reality. Rubber meets the road. Some plans work well; others quickly fall apart. Month by month, the departments labor to make their contributions to the body politic. Month by month, the departments learn, adapt, and evolve as they apply their best efforts toward achieving their objectives – sometimes with exuberant success, sometimes with sobering defeat.

All the time, each department and the organization as a whole must continue to keep their sights fixed on their goals, not the plans. Success does not mean following the plan; success means reaching the goal. Success comes step by step, down one path and then down another, until we get where we need to be.

This is a management challenge at its finest. It is a challenge that often defeats organizations. As they confront the unanticipated aspects of reality, organizations learn the shortcomings of their plans. Instead of maintaining the goals and revising their plans, many organizations throw out the baby with the bath water. They abandon their plans entirely and finish the year in seat-of-the-pants organizational chaos.

What has your group done when plans did not work out? Did you adapt to the situation and modify your plans, or did you abandon your efforts?

Rolling Plans and Objectives

Successful organizations learn to plan and execute on a continuous basis. Today's plan is our current best guess about what to do and how to do it. We know what goals we want to accomplish; so each day we take the wisdom we have gained since yesterday to make our plans better.

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In the world we live in, “yesterday” is a metaphor, of course. While change happens literally every day, changes large enough to dictate significant shifts in our plans are more likely to happen weekly, monthly, or quarterly. Complex, multifaceted plans do not change entirely. More likely, a single component of a plan may change while most other elements of the plan are unaffected. Overall then, plans continue to exist over long periods of time as recognizable and functional entities, even as parts of them are being continuously modified.

What does this look like when it is implemented by a strategic plan manager? A simple and powerful mechanism is for each department to create a monthly planning sheet that contains one-month, two-month, and three-month objectives. Each month this is renewed. Last month's one-month objectives are reviewed to see if they have been accomplished. Celebrations greet those that have; lessons learned and recalibrations come to those that have not. Last month's two-month objectives roll down to become this month's one-month objectives, and the three-month objectives roll to two month objectives. New three-month objectives get added.

As the strategic plan manager and department planner review each month's planning sheet, they will also uncover departmental achievements that were unanticipated by the plan. If these unplanned achievements contributed positively toward organizational goals, they should be

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assessed as possible examples of “emergent strategies.” Emergent strategies are strategies we do not think of during formal planning sessions, but which make themselves known, often at the grass-roots level, as we exercise professional judgement doing our work for the organization day-by-day. Sometimes, emergent strategies are significant enough that the strategic plan manager should make them known to all the other departments.

Has your group institutionalized a process by which you create objectives, monitor them, and keep them continuously evolving and improving? If not, your group may be great at planning, but you are probably not successful in executing your plans.

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Individual Contributions

If the journey of a thousand miles starts with a single step, the organization of a thousand accomplishments begins with a job well done by one individual. Your company’s success comes from having each person in your group contribute in a way that reinforces and promotes the efforts of every other person.

For thousands of years, people believed this could be accomplished best through a model known as command and control. The idea was to have a single authoritative leader, usually a man, who did all the strategic thinking. He formulated plans from which he created orders to pass along to his subordinates (command). Everyone trusted the leaders and believed they did the best possible job of understanding the strategic forces at work in the world and making plans that would lead to successful outcomes. The worker bees’ only responsibility was to follow the orders (control).

For most of today’s organizations, the command and control model is no longer the best way to perform strategic activity. Employees are well educated, skillful, personally in touch with our customers, and directly in control of powerful modern tools, which may be in the form of fighter jets, personal computers, or multinational service corporations. In today’s world, too many events happen at too great a speed among too many impacting influences for a single authoritative leader to effectively issue commands and maintain control.

Your organization’s leaders can make whatever plans they want to. Execution, however, depends on employees. The days are gone when bosses could bark orders, expect subordinates to obey them, and expect everything to work precisely as planned. Successful organizations today depend upon individual employees making timely, correct decisions and taking effective actions on their own. Granting employees the authority to do this is known as empowerment.

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Employee Empowerment

You cannot expect employees to be empowered just by telling them they are empowered. Strategic empowerment has requirements:

- Employees must understand the organization's mission, goals and strategies. If employees are empowered to act on their own authority, and if we expect such actions to be strategically aligned with the group, then every employee must understand our company's goals and strategic directions.
- The organization's managers must willingly allow individuals the authority to act on their own. Managers must still coordinate, but they cannot dictate the actions of their workers. Many managers have not learned how to influence their workers except through forces of authority and intimidation. Their workforce has no chance to be empowered.
- If workers are authorized to act on their own directions, an environment must be created to support, constantly educate, and continuously improve each employee. The organization can improve only if each worker is able to learn from his or her experience.

Research has shown a divergent impression of empowerment in many workplaces; it is common for managers to consider their employees empowered, but for employees to believe they are not. Do you know whether employees believe they are empowered in your organization?

Live and Learn

If each yearly strategic planning session is a brand new adventure, you are probably doing it the wrong way. Once you get into a strategic groove, your organization should follow a cycle of planning, doing, evaluating results, re-planning, re-doing, and so on. Your monthly reviews should be a foundation for your next, more extensive yearly planning sessions. Every session should be fertile ground for hatching innovative ideas, coordinating activities, modifying goals and objectives, and institutionalizing new strategic directions. The yearly strategic retreat should be different in size, but not different in kind from the strategic planning your organization goes through all year long.

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An organization on its way to success blends **planning** and **doing** into one well-integrated process. Your company's leaders need to place your strategic plan under the authority of a single capable manager, align the efforts of all your departments, and empower your workforce to contribute to the successful achievement of your organizational goals.

Checklist for Strategic Doing

What your organization should be doing if you want to turn strategic plans into real success.

1. Have someone in your organization designated as the manager of the strategic plan.
2. Give the manager of the strategic plan the authority to enforce strategic alignment throughout the entire organization.
3. Focus your organization on its goals and objectives. View the strategic plan only as a means to achieving goals and objectives, not as an end in itself.
4. Use a process, such as rolling three-month objectives, to review and change departmental plans on a continuous basis throughout the year.
5. Be alert for successful strategies that emerge from the grass-roots efforts of your staff, and institutionalize these emergent strategies.
6. Take the necessary steps to empower your employees so they can contribute effectively.

*For further information about Strategic Planning or CDR's Management Consulting services for nonprofit organizations, feel free to contact Dr. Zimmerman at Creative Direct Response, Inc. or read his book on Strategic Planning: **“Management Walkabout: Discovering Your Organization's Strategic Readiness.”***

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