Stacking the Deck in Favor of a Successful Strategic Planning Effort

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An interview with Harvey Bergholz yields five tips for increasing the odds that your strategic planning process will be a successful one.

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When it comes to strategic planning, one of the most successful consultants I know is Harvey Bergholz, president of Jeslen Corporation (see more about Harvey at the end of this piece). Harvey has an outstanding track record when it comes to designing and facilitating strategic planning experiences for his clients and I recently persuaded him to sit down for an interview and share some of his insights. This piece is based on that interview and I've extracted from it five tips for stacking the deck in favor of a successful strategic planning effort.

Tip #1 - Customize the Process

Harvey suggests that the single most important thing you can do is customize the process. There is no "one-size fits all" strategic planning process. Whatever process you use has to suit your company's style and its culture. Just as important, it has to be a fit with your CEO's style and personality. Customizing the process involves making decisions about the following:

- How short or how long the process should be? Should it stretch out over several months or should you try to pack it into a 2-3 day off-site session?
- The number and kinds of process elements involved. Do you really need a SWOT analysis and/or a PEST analysis or should you focus on a few strategic issues?
- Should the tasks be grouped and bunched up, tackled by a few people or scattered over a longer time frame and involving lots of people?
- Finally, do time pressures and the nature of the issues imply a top-down approach or do requirements for commitment and involvement suggest some kind of bottom-up approach?

Helping you customize the strategic planning process is obviously one place where a consultant can be of assistance.

Tip #2 - Forge the Links to Implementation Early On

We've all heard of (and some of us have seen) situations in which vast amounts of time and energy were poured into preparing a strategic plan only to have it languish on the shelf, unread, unused and having no real effect on the organization. As often as not this occurs because the folks who developed the plan were so caught up in their task that they neglected to involve and obtain the commitment and input of the folks who have to execute the plan. Harvey advocates forging the links to implementation early on. Involve the people who will be responsible for implementing the plan. Get their input; make them part of the process. Let them troubleshoot the plan. The plan itself will be the better for it and its chances of getting implemented are greatly increased.

Tip #3 - Don't Over-Engineer the Process

It's easy to get carried away with strategic planning. Let's be sure to do a SWOT analysis. Oh yes, let's do a PEST analysis too. (And let's add regulatory trends to political, economic, social and technological trends as factors to be considered.) Bring in that big consulting firm and pull staff away from their regular duties to produce the volumes and volumes of information and data the consulting firm will require. Schedule meeting after meeting and produce mounds of documentation. (Note: Another of

Harvey's tips is "Don't' write too much" and we'll address that in a separate, follow-on piece.) All or none of that documentation might really be required. But the more of it you require that isn't really necessary, the more you are over-engineering the process and thereby making it a punishing instead of a productive experience. Keep it simple. Do no more than is necessary but be sure to do everything that is necessary.

Tip #4 - Don't Waste Valuable Meeting Time

Most of us hate meetings. Far too many meetings are genuine time wasters. One of the biggest wastes of valuable meeting time in strategic planning efforts is using such meetings to generate information and engage in non-strategic discussions of non-strategic matters. Keep your strategic planning meetings few in number and tightly focused on strategic issues. Don't let those tactical issues creep into and then dominate the conversation. If you do need to generate or collect data and information, do as Harvey does: use pre-meeting and between-meeting assignments, including telephone interviews, to get the information gathering and other routine tasks accomplished. Save valuable meeting time to develop shared understanding of the critical issues facing your company and for making strategic decisions about those issues. Harvey's clients appreciate that and so will the participants in your strategic planning efforts.

Tip #5 - Be Very Clear About…

Finally, Harvey says there are two things you need to be really clear about at the outset of any strategic planning effort: (1) the meaning of "strategic" and (2) the role of the consultant if you're using one.

People use the term "strategic" all the time and they use it in different ways. This leads to confusion and baseless disagreements. Harvey suggests these parameters for "strategic":

- The issue or strategy has the potential for significantly altering the company's direction or its financial situation.
- It entails high risk, either in the sense that failure is ominous or that execution is complicated by the requirement to involve all or most functional areas and thus depends on difficult to obtain close cooperation and tight coordination.
- It has high futurity, which is to say that the strategy and the actions in support of it are not easily reversed or undone. There is no going back.

If your strategic planning effort isn't grappling with these kinds of issues then chances are it's not really strategic planning but ordinary operational or business planning.

Also, be very clear about the role of the consultant. Essentially, there are two roles. First, the consultant might be involved primarily in designing (customizing) the strategic planning process and then facilitating it. That's often the case in larger companies. Or, the consultant might be an actual participant, joining in the discussions and offering up possible strategies or issues to be considered. This is often the case in smaller companies where the breadth and depth of industry, business and

management expertise can be somewhat limited. Harvey has worked successfully in both roles and one of the keys to his success is being clear about which role he is in.

About Harvey Bergholz

Harvey Bergholz is president of Jeslen Corporation, a successful consulting firm he has headed for more than 35 years. Harvey's typical clients are C-level executives in a wide variety of companies and industries, ranging from large and small closely-held family enterprises to multi-billion dollar global corporations with tens of thousands of employees. Much of Harvey's work over the years has centered on helping his clients carry out their strategic planning efforts – and with implementing those plans.

About Fred Nickols

Fred Nickols is a writer, consultant and former executive who is also managing partner of Distance Consulting LLC. Fred's many articles and other publications are available free at www.skullworks.com. He and Harvey have worked together on many projects over the roughly 30 years they've known one another.