Strategic Planning Pitfalls – Before, During and After

BY BOB HARRIS, CAE

IMAGINE PREPARING FOR months to plan the leadership retreat. You’ve convinced busy volunteers to chart a course for the organization.

Assume you’re at the retreat and during the first hour you see the board chairman glaring at you; you notice a few members doodling; and the executive officers are looking at you with angst.

You interpret their body language correctly as, “Don’t you know the value of our time?” As the CEO you wonder if strategic planning (or the facilitator) was a mistake.

To avoid this scenario, break down the planning process into three phases – before, during and after.

THREE PHASES OF PLANNING – 91 DAYS

A strategic plan is a roadmap to guide the organization, the leadership and staff. It offers a message that the organization has a worthy mission and goals to fulfill. With no plan, volunteers and staff tend to wander from crisis to crisis.

Break down planning into three phases: Before, During and After. Before will require 60 days. During may take one or two days. After requires about 30 days.

BEFORE

“Before” concerns the determination to create a plan and answers critical questions leading up to the retreat.

Who should participate? A planning session with too many people boggs down the process; too few people and you miss the diverse input. An ideal number at the table is about 20 persons – a manageable group, allowing input by everyone. If your board is small, consider inviting other stakeholders such as chapter representatives, key committee chairs, younger members and senior staff members. One of the traps of planning is to exclude the staff that can offer valuable information and can benefit from the discussions.

Where to do the planning? Interruptions such as phones are planning distractions. Find a relaxed setting away from familiar offices. Just the act of driving an hour away and being in a new environment is a catalyst for good planning.

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How long should it take? Most plans are conducted in a day or two. It is ideal to begin one day, take a relaxing break that night, and return to finish it the next morning. Three-day retreats ask a lot of busy leaders. More often, organizations are asking if planning can be done in a few hours. Discuss with the leadership how much time they have to contribute and if they prefer one, two, or three days. The shorter the allotted planning time, the less attention to action steps and accountability.

Do we conduct surveys? Be sure to ask the members for their input. If you neglect this step, you'll be asked, "Why didn't you ask the members for input?" Consider surveys of members and leadership to determine their priorities. An adaptation of the SWOT format (strengths, weaknesses, opportunities, and threats) creates an effective survey.

What about a strategic planning committee? Many of the decisions and survey development can be managed by committee. They can also conduct focus groups for additional stakeholder feedback. Beware of the
spread accordingly. Little is more disheartening to staff than to see a plan that dumps everything into the first year. If some good goals are suggested but just don't fit inside the duration of the plan, consider "Parking" them so that the next planning retreat can review recommended goals that were not included in the current plan.

**What about action steps and accountability?** Longer retreats allow more discussion of action steps. These are the identification of quantifiable measurements and the delegation of the work. Some boards like to tackle action steps while others feel it borders on micromanagement and can be best handled by staff. If the plan does not include action steps, deadlines, and committee assignments, then staff should draft an action or business plan for the year – based on the strategic plan.

**What's the final report look like?** Planning can result in a 40 to 100-page document. Consider that the staff and leadership have to read and use the plan, so shorter may be better. There is minimal value in long reports that include every discussion, survey results, sample questionnaires, brainstorming dialogs, etc. – they distract from the actual plan. To create the report you want, envision how leaders and staff will it. The mission, vision, values, goals, strategies and action steps can be formatted in seven to 20 pages, making it easy to read and use. When hiring a facilitator, ask to see samples and discuss the final plan format that suits your needs.

**AFTER**

"After" the retreat, the next 30 days is critical for success of the plan.

**Do we officially adopt the plan?** When the retreat is over, transcribe the notes and flipchart pages into a dynamic document. It has public relations value so keep it upbeat and celebrate the results and participants. Within 30 days, circulate it to participants and key stakeholders for review. Officially adopt the plan at the next meeting of the board.

**Does the plan get publicized?** At this point, 98 percent of the process is done. One last step is to market the new plan. Create a newsletter article, information for the Web site, a press release or brochure that describes the new goals. One way to make sure the plan gets accomplished is to tell others about the goals, programs and services they can anticipate from the organization.

**How do we keep the plan alive?** Many organizations put the plan in a notebook and slide it on the shelf to collect dust. Appoint a plan champion who will monitor and report on progress or setbacks. To be sure the plan is discussed at board meetings include an agenda item, "Strategic Plan Update."

**Does the plan affect the budget?** The plan is not independent of other operations. It will have an impact on the budget, committees and marketing. Integrate the new goals and strategies into existing programs and operations.

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