

## **PLANNING TO PLAN**

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Planning to plan? Preparing an organization for a strategic planning exercise is like preparing for a trip. Deciding to go and being ready to leave are two different things. Among the considerations are timing, commitment, getting people on board and data gathering. Here are some pre-planning tips and considerations for starting the journey to mapping out your organization's future.

### **Pick your timing:**

- **Don't do it during a crisis**

It's hard to take a long-term view when your house is burning down. Crises can be a rallying point for an association. When their members' business case is changed overnight – because of such things as new legislation, advances in technology or global or economic factors – good associations kick into high gear with a strong plan to mitigate or even capitalize on the situation. But don't confuse crisis management with strategic planning. Crises are largely reactive opportunities. Deal with them first, and then set aside time for a proactive look at how you can create the conditions for future success.

- **Respect the planning cycle**

There's a strong temptation for outgoing CEOs or Board Chairs to "leave their house in order" by nailing a new strategic plan at the end of their term. It's satisfying. It leaves a personal stamp on the organization. It sets objectives based on experience for the new team. Some even restructure the organization as their farewell gift. All of this is well intentioned but unfair and impractical. Planning cycles start with the beginning of a new mandate, not with the end of an old one. New leadership must be given an opportunity to inspire, take advantage of new thinking and above all, have ownership of the plans it is responsible for executing. This ownership is essential - no one ever washes a rental car. You can't expect passion and commitment to a plan forged by the old guard.



- **Recognize that some organizations require team-building first.**

For associations with badly divided boards, high turnover, or feuding staff, a full-blown strategic planning process is a risky starting point for real cooperation. To establish teamwork for both planning and its execution, organizations may wish to consider management training for senior staff, or starting the Board group off slowly with a highly interactive session on a related topic or issue. For many groups, creating a decision-making framework can be very helpful.

### **Make a real commitment:**

Unless you're committed to spending time and resources, don't expect a quality result. You can't accomplish strategic planning on the fly, tucked into existing Board agendas. Separate time must be set aside. Staff who will be instrumental in preparing background information for the session may have to put other projects on the backburner to ensure you have what's needed.

### **Make sure the right people are on board:**

- **Your CEO should be the champion of the process.**

While strategic planning is teamwork, it also needs strong leadership to succeed. You need a top-level driver who is committed to planning and strategy.

- **Broad participation pays off in the end.**

Don't be afraid of having too many people involved in your planning meeting. Ideally, the entire Board should be invited with input from other key stakeholders too. It will ensure representative input and greater ownership of the results. The higher the participation, the higher the commitment to your new strategic direction. A small planning group or Board subcommittee working alone is a false economy.

- **If low Board attendance threatens, pick a new date.**

A planning process builds consensus. When it takes place at the start of a new Board mandate, it can be a key element in creating team spirit and a decision-making culture that involves new Board members. If you forge ahead with a low turn-out, you'll spend the rest of the year explaining to people what they missed and rearguing every decision. You'll also miss



valuable input. Make sure there is plenty of advance notice and time to prepare for the planning session.

- **Include the people who will implement the plan.**

Staff commitment increases when they are involved in planning – after all, it’s hard to resist your own ideas. These are the people who will determine and execute the details. They should participate in the discussion, vision development and passion that forge a new agenda, and understand the trade-offs that are acceptable in shaping a realistic work plan to accommodate new objectives.

- **Include your subject experts.**

Regulation? Technology? Customer service? Internal Finance? Subject experts are important to a strong planning outcome.

- **Use surveys or focus groups to gain insight from groups of people who can’t or shouldn’t be present.**

Member surveys and stakeholder surveys can make the world of difference in forging new directions. What do key stakeholders think of your organization and the challenges you face? You will need a strong appreciation of your organization’s strengths to plan effectively, but insiders can develop “tunnel-vision” regarding where these strengths lie. Web-based surveys or annual conference sessions can deliver new insight to your planning team as pre-planning exercises.

- **Make sure you have a great facilitator, whether internal or external.**

This will free up your CEO to participate, make efficient use of time, ensure participants all have an opportunity to contribute, challenge the status quo when necessary, and help you stay focussed on moving from vision to action.

### **Gather and distribute the right information in advance:**

Advance information allows your planning team to focus and arrive primed for discussion, providing it’s relevant and not overwhelming. It’s a little like packing your bags for travel. Too much baggage or the wrong items will weigh you down unnecessarily. Too little will leave your team unprepared for the challenges ahead.



These are just some of the important preparations. A thoughtful review of these elements will help you avoid some common roadblocks and set you on the right track for the journey to planning success.

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