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## "Quotes"

*"We are nearly at the end of a comprehensive strategic planning project that will identify new visions and directions for the organization."*  
~Jed Bernstein

*"He always challenged me with long-term strategic planning, what would make [us] excellent."*  
~Mike Daley

*"The planning committee is the first step to making us better prepared[.] We must continue to stay alert and work closely together."*  
~Larry Davis

*"What we need is some clarity as to the direction of the business, and what the management commitments are in respect to company strategy and the financial performance attached to that."*  
~Marc Desmidt

*"I personally am pleased with the strategic planning process. Staff, and the board, set goals and are accountable."*  
~Evelyn Fox

*"There are many, many people involved in strategic planning, decision making, getting approvals[.]"*  
~Paul Gaffney

*"These positive numbers also tell us that it is the time to plan and the time to invest in the skills needed for the future[.]"*  
~Ken Georgetti

*"It's going to allow city staff more uninterrupted time to*



Dear Friend,

## Don't Assume!

My husband is a wonderful teacher. He's not in the classroom, but he's great at providing practical instruction and finding, what he calls "teachable moments", in so many arenas.

Perhaps what makes him so effective when wearing his teacher's hat is that he doesn't assume that people know stuff. He typically leads with a disclaimer like, "You may already know this, but I like to start from Step 1 just to be sure that we're on the same page. If you already have it, it's a refresher! If you don't, well, you'll learn it now." That tends to disarm people; they don't feel as if he's got any preconceived notions specifically about them. It's just the way he approaches the learning experience.

I think this is a great approach, and so I'm going to borrow it!

In this month's edition of [EA Insights](#), we continue our examination of Successful Strategy with a look at the strategy-development process. Read on, as I walk you through six steps to help you generate a plan that positions you to achieve the results you're after. And, in keeping with my hubby's practice, I will assume nothing!

Here's hoping you get either a refresher or some new information that will aid you in advancing your goals!

All the best,

*June*

June Melvin Mickens  
Executive Advantage, LLC

## Successful Strategy: Plan with Care!

June Melvin Mickens  
Executive Advantage, LLC



As we continue our examination of successful strategic thinking, we turn to the planning phase of the process. In case you missed last month's installment on preparation, feel free to [go back](#) and read that first.

However, at this point, you've laid the groundwork. You have a sense of desired outcomes. You have a pretty clear handle on where you stand. How

do you move forward in a way that is likely to yield a realistic plan -- one that is implementable? Let me offer six steps to get you there.

### Step 1: Devote time.

Sure, you can carve out a few minutes right now to plan for your day. When you're thinking about broader-based strategy, though, more than a snatch of time here and there will be necessary. No, to develop a comprehensive, cohesive, and convincing approach to the future, it's essential to devote sufficient time. Don't rush it. Give yourself (and your team, if you're planning for an organization) the space to really work through the process.

### Step 2: Include the right people.

**The People Involved** -- Have you ever had someone lay in your lap a blueprint for an assignment you were to undertake? It's nicely wrapped, completely thought through from A to Z. And, plunk...you're told, "Just do it!" If this has ever been your experience, you likely had one of two responses: "Thank you, because I sure didn't have time to map this all out!" OR "Well, this is fine, but I would have LIKED to have had some input into this! After all, it's something you want ME to do!"

The latter response leads to what I mean by *including the people involved*. The planning process is likely to produce a more solid approach if it involves participation by those who will play a part in implementation (or, at least, representatives of those units, interests, responsibility areas, etc.). Those are the folks who know the day-to-day nuances, the strengths and challenges, the things that might not

be readily apparent to someone not in the trenches. Not only will the resulting plan be tighter, the support for it is bound to be stronger because there's ownership by those who were involved in its crafting.

**A Strategic Thought Partner** -- Especially if you're developing a personal plan, but even for an organization, it's helpful to integrate a strategic thought partner into your planning effort. This is someone who isn't in the midst of your mess, someone who can see (and encourage you to see) the situation with clear eyes. You want a person who can help you to appreciate inconsistencies, identify potential snags, add clarity where it's lacking, seek more information where there are holes. Such unbiased support is invaluable in the creation of meaningful strategy.

### Step 3: Link the plan to the desired outcome.

I can't tell you how many times a person or team has shared their plans with me, and what I see is a random set of thoughts. Okay, you might say there are goals in there somewhere, but there's no or little link back to what the author(s) laid out as desired outcomes for the period. And that, my friend, is a one-way ticket to an unsatisfying strategy experience. You know you did a lot of work but, by golly, you sure don't feel as if you got anywhere!

While there always will be some things you just *want* to do, in successful planning it's essential to tie your main goals to the desired outcome(s) you've set out. In order to get to Outcome X, what *exactly* do you need to do? That work that must be done becomes your goal. And, every goal should point you back in some way to that ultimate result you're after.

### Step 4: Develop specific goals.

Speaking of goals...in order to position your planning to have real traction, you want to have tight goals. Goals aren't just random thoughts; they should be crafted in a way that's clear, specific, actionable, measurable. You may roll your eyes when someone mentions the SMART acronym, but I'm a witness that SMART goals usually *are* better able to be acted upon than loosey goosey ideas masquerading as goals.

Also, if you're planning for an organization, please recognize that having specific goals at the top level is only the tip of the iceberg. Those universal goals get you going, but then it's up to each of the units in the organization to examine those top-level goals and to determine what *it* must do -- the goals *it* must have-- in order to advance the overall direction. And, those goals too should be SMART. When you take the top-tier goals and combine them with associated goals from all ends of the organization, then you have the makings of a plan!

### Step 5: Document it.

Put pencil to paper. (*Okay, you know what I mean.*) For planning to be successful, to develop something you truly can implement, don't try to keep it all in your head! First, that's a sure-fire way to keep yourself up at night; *remembering* is hard work and doesn't allow your brain to shut down. Second, there's just something about *seeing* ideas. They become clearer; you can grasp holes, reprioritize as needed, and chart a course from start-to-finish. Finally, documenting your planning allows you to pass it on to others so that they can join you in strategy development and in the execution process.

### Step 6: Communicate it.

Communication becomes essential in organizational planning. All too often an organization invests time, effort, and dollars into developing strategy only for that wonderful creation to sit on someone's bookshelf never to see the light of day. How sad! What a wasted effort! To transform solid strategic thinking into successful results, you've got to share it!

Talk about what was behind the direction that was set. Talk about why particular strategies seemed more appropriate than others. Talk about the goals chosen to advance the work. Talk about how each unit and person plays a part in achieving success. Don't just talk once and think that'll do it; talk, and talk, and talk some more...all throughout the process of carrying out the effort.

If you're planning solely for yourself, don't tune out on the communication step. Talk to yourself. (*However, you may not want to do it out loud; folks may think you've lost it.*) Essentially, you're stepping back and presenting your plan to yourself so that you can take it in anew and begin to transition from planning phase into action phase. And, because it's so easy to forget when you're in the middle of work and facing deadlines and craziness, you want to reconnect with your plan periodically in order to remind yourself of what you're working toward and why you chose that specific path to get there.

So, to have your strategic thinking better able to position you for success, don't skimp on the planning phase of the process. But, if you could use some help -- that strategic thought partner I mentioned in Step 2, don't hesitate to call on **Executive Advantage**. We'd be honored to work with you to develop a winning plan. [Contact us today](#).

And, don't miss next month, as we examine the final part of successful strategy -- execution and measurement.

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*plan our city."*  
~Rudolph Giuliani

*"We want plans. We want specific goals and procedures we're going to take to prepare[.]"*  
~Tom Harkin

*"Engaging everyone who should be involved in developing a comprehensive plan for such a large and diverse industry is essential for it to be successful but presents a major challenge for the planning team."*  
~Don Holecek

*"Leaders deliver confidence, that's what they do. They make decisions, they set strategy, they do all the technical stuff, but they also have to make people feel confident that their efforts will pay off."*  
~Rosabeth Kanter

*"Effective leaders help others to understand the necessity of change and to accept a common vision of the desired outcome."*  
~John Kotter

*"Strategic planning will help you fully uncover your available options, set priorities for them, and define the methods to achieve them."*  
~Robert McKain

*"You've got to be diligent in wanting to get to a goal. So absolutely, you have to be realistic with your goal in the first place. Know that you're going to have to be patient and take the time to plan for a goal."*  
~Tessie Moton

*"Specific goals have specific results[.]"*  
~Rosie O'Donnell



## About Executive Advantage

At **Executive Advantage**, we are committed to providing results-based business and management consulting, leadership development, and coaching support. We partner with business leaders to build healthy, well-functioning organizations, where goals are met and people thrive. We also partner with individuals to create professional (and personal) lives with clearer direction, improved results, and greater balance.

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