



P L A N N I N G :

How Does Your Strategic Plan Rate?



Just about every organization has spent resources and leadership time developing a strategic plan—usually the benefit is short-lived and the plan gathers dust. In fact, many on your leadership team have probably been through multiple planning sessions and would rather not spend any additional time going through another one.

The main reason for this is because the Plan is not a “living” document that everyone in the organization can relate to and understands. They just don’t feel that they personally fit in or that it is applicable to their daily tasks.

An excellent, simple exercise to evaluate the robustness of your plan is to have the leadership team rate the your current plan in ten key areas. A simple rating scale of 1 to 5 can be used ... with 1 signifying “not at all” and 5 indicating “absolutely”.



1. Mission is clear - "We know what we want to be!"

- Is the leadership team in agreement on the Mission (and/or Vision) and Values of the organization? Would just about everyone in the organization be able to state them if asked? There's an old proverb that says, "If you don't know where you are going, you'll probably end up somewhere else."

2. We have a clear and honest understanding of our current situation - "We know where we are!"

- A while back, Fortune Magazine had an article on why companies fail. The common reason was that they did not have an honest self-assessment of "where they were" - they convinced themselves that they were fine, not in trouble.
- It's critical to have a vision - but it's just as critical for people in the organization to understand "it's not okay to stay where we are" - so they need to be presented with the "brutal facts".
- A regularly updated strengths and weaknesses assessment is a great base for determining where you want to go next.



3. Objectives are clear and balanced - and drive the way we do our work. They will result in success if accomplished.

- Are the main things (objectives) that the organization wants to accomplish clearly spelled out? Do they involve all areas of the organization? Do they really drive what gets worked on in the organization?
- If we accomplish the plan, will it actually result in the organization's success?

4. Responsibilities to execute the Plan are clear

- For every objective and action plan, there needs to be a clear "owner", plus buy-in from everyone who needs to "support" it.

5. Timelines to achieve the objectives and action plans are clear.

- There needs to be accountability for "when" the objective or action plan will be accomplished.



6. Metrics to measure progress are clear.

- For a plan to be effective, you must be able to measure the progress and achievement of each objective or action plan. The metrics don't have to be numbers - they can be when a study, report, or activity is completed.

7. The Plan is visible and understood by almost everyone in the organization.

- One of the critical benefits of the plan is that it "aligns" everyone in the organization. So, it's important to communicate and make the plan visible to everyone in the organization.

8. Employees can see how they "fit" into and contribute to the Plan.

- Every employee, should be able to see how their work and effort will contribute to the success of one or more of the objectives in the plan.



9. There is a common way to document Objectives, Action Plans, and Metrics

- Establish a common form or spreadsheet to document the plan. It adds a lot of value if there is a central place to place to store the plan that is accessible to every owner.
- If the plan is “visible”, it really helps to provide reinforcement of the value of the plan. Two examples which can make the plan visible:
 - Develop a “Planning Wall” in a conference room or hallway - where the major elements of the plan are displayed. Conduct the regular review meetings at the wall.
 - Develop a brochure/handout to everyone in the company outlining the major plan elements for the year - reinforce the mission and values by including those as well.



10. Progress to Plan (at each level in the organization) is reviewed and actions are taken when Plan Objectives and Action Plans are not being met

- The plan should be a “living” document, which means that progress must be reviewed and acted upon regularly (at least monthly).
- As the year progresses, if there are elements of the plan that are no longer valid, then feel free to make adjustments to the plan. Remember: The plan is not developed to “control” the organization, but as a “tool” to help the organization go from “Here” to “There”.

HOW DOES YOUR STRATEGIC PLAN RATE

"SOUND PLAN" ELEMENTS	RATING 1 -5 (1-Not at all 5-Absolutely)	WHY DID YOU GIVE THIS RATING?
1. Mission is clear - "We know what we want to be!"		
2. We have a clear and honest understanding of our current situation - "We know where we are!"		
3. Objectives are clear and balanced - and drive the way we do our work. They will result in success if accomplished		
4. Responsibilities to execute the plan are clear		
5. Timelines to achieve the objectives and action plans are clear		
6. Metrics to measure progress are clear		
7. The Plan is visible and understood by almost everyone in the company		
8. Employees can see how they "fit" into and contribute to the Plan		
9. There is a common way to document Objectives, Action Plans, and Metrics		
10. Progress to Plan is reviewed and actions are taken when plan objectives and action plans are not being met		

Note: A "sound" plan will have all 10 elements rated above a "3"



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