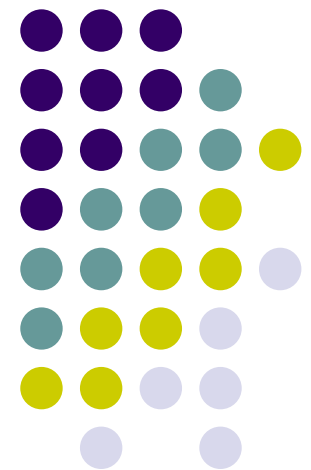


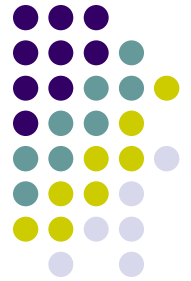
Building Sustainable Organizations Through Participatory Strategic Planning

Net Impact
Impact at Work Series

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Modern Strategic Planning



- Designed for “systems”
- Purpose: to achieve a desired system state
- Deals with long-term timeframes
 - Greater number of variables outside the system
 - Greater uncertainty
- Puzzle Solving vs. Problem Solving
- Maneuvering through implementation
 - Only people make it happen (or not)



Process vs. Product

Paraphrasing Gen. Dwight D. Eisenhower:

“Strategic plans may not be worth much, but the act of planning is indispensable.”

Effective Strategic Planning (and IMPLEMENTATION)



- Need to get the system in the room
- Need to create an environment of trust
- Need to be willing to take the long view
- Need to be open to new ideas
- Leave your ego at the door

Define Your “System” and Get the System in the Room



- Employees
- “Management”
- Customers
- Vendors
- Regulators
- Other formal and informal leaders
- Balanced representation



Establishing Trust

- Facilitator
- Set clear ground rules and stick to them
 - Participate Fully; Listen to Learn; Respect the Speaker/Listener; It's OK to Disagree; No Sidebar Conversations; Cell Phones Off/Silent; Others?
- No titles allowed – first names only
- Balanced stakeholder representation
- Document, document, document (flip charts, notes)

What to Discuss: The “Problem” with People



- Only people can make anything happen so, ultimately, effective strategic planning and IMPLEMENTATION is about people
- BAR Formula – people act based on (a) their most closely held beliefs (= values) and (b) their perception of the results from those actions
- A strategic plan that ignores values and beliefs will drive inconsistent actions and will therefore produce inconsistent (and often undesirable) results
- People are willing to collaborate when they work in an environment of mutual trust – this process lays the groundwork for (or enhances an existing environment) of mutual trust



What Do People Care About?

- Money
- Time Off
- Benefits
- Job Satisfaction

YES to all these AND.....



The Role of Meaning

- First and foremost (though not often articulated), people want to discover “Meaning” in what they do.

Why does this matter?

Because people are willing to die for things they believe in and derive meaning from.



Discovering Meaning

- Life Questions:
 1. Did I give and receive love?
 2. Did I become all that I could be?
 3. Did I leave the world a little better?
- Business Questions:
 1. What do we want to become and what legacy do we want to leave (contribution)?
 2. How can our organization help us do that?
 3. What would such an organization look like?
 4. How do we get it to look like that?

The Company/Department Vision Statement



- A compelling vision statement answers 4 important questions:
 - “Why are we here?” (this must also answer “So what?”)
 - “What is our ideal relationship with one another?”
 - “What is our ideal relationship with our customers?”
 - “What contribution do we wish to make to the global community?”

Making it Personal (pssst....It HAS to be)



“What are my skills and talents, and are there gaps between those talents and what I am bringing to the job, to my career, and to my relationships?”

The Planning Event: Suggested Structure

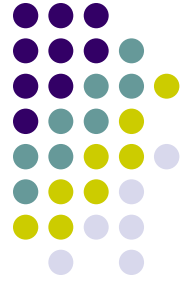


- Day 1 and Day 2
 - Participants
 - Advisory Board (Attorney, Accountant, STAR Group, CEO, COO, CIO, 2 Clients, 1-2 Vendors)
 - Vision – the organization’s legacy
 - Mission – how can we use our collective gifts and talents to achieve the Vision?
 - Shared Values (what do we stand for? Remember the V-BAR formula)
 - SWOT analysis
 - Barriers
 - Goals (SMART): forward-looking or work backwards

The Planning Event: Suggested Structure



- Day 3 and Day 4
 - Participants: CEO, COO, Key Managers, Employees (possibly vendors/clients as well)
 - Review and Modify Vision, Mission, Values, SWOT Analysis, Barriers and Goals
 - Values review is critical: everything in the Plan needs to flow from and be consistent with the organization's set of shared values
 - Develop Strategies (How) and Action Plans (Very Specific) for fulfilling the Mission and realizing the Vision



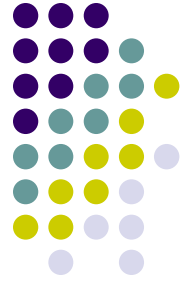
Action Plans

- Elements
 - Action Step
 - Owner
 - Resources Needed
 - Timetable
 - Performance Measure(s)
- If no one is willing (voluntarily) to own it, it's not important!



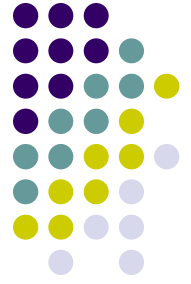
Other Important Principles

- A Sustainable Organization (SO) is one that is (or is very nearly) self-managing
- A SO does not ignore the need to make money; it simply chooses to not sacrifice its values to do so
- All policies and actions must be consistent with the organization's shared values
- The shared values must be articulated clearly
- Set high standards for performance and participation – you'll be amazed at what you get
- Follow-through is critical – to be effective, the values, Vision, Mission and goals must be top of mind every day (Southwest Airlines)



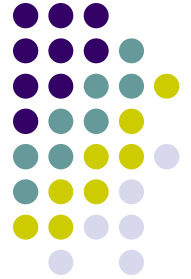
More Important Principles

- Be sure you have the right people on the bus
- Be sure the right people are in the right seats
- Don't accept mediocrity
- Embrace entrepreneurial "learning" (but be sure to LEARN)
- Life happens, changes occur – be proactive and adaptive by convening your "system" regularly to keep on top of changes
- Don't be afraid to reassess your values and your plan – as often as necessary (the values should not change much, but it's worth it to make sure your values are still your values; remember – everything must flow from and be consistent with your values)



Final Thoughts

- Effective stakeholder planning can happen at any level of the organization.
- Effective planning involves some risk and a willingness to listen actively to things you may not necessarily want to hear. As such it is an exercise in LEADERSHIP.
- As with any successful endeavor, you don't have to get it right, you just have to get it going!



Thank You!

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