

## 1 DO YOUR HOMEWORK

Appropriate pre-work includes a client/customer survey and employee survey at a bare minimum. If time and budget permit, a survey of your senior management team is worth the investment. Find out what the real issues are first-hand.

*"We talk about the quality of our relationships and the quality of our communications and the quality of our promises to each other." ~ Max Depree, former CEO, Herman Miller, Inc.*

## 2 KING ARTHUR WAS RIGHT!

Round tables work! Use a golf resort, a spa, an executive training center -- whatever you do, go OFFSITE. I have yet to find a management team that is very creative sitting in coat and tie at a rectangular boardroom table!

*"The real purpose of strategic planning is to alter the mental models of managers, so they can perceive change and respond."*  
~ Peter Senge, Author

## 3 BUILD THE TEAM

The best strategic planning sessions I have facilitated are those that started with some teambuilding. Break down barriers; get to know one another in new ways; stretch your thinking! Use a high ropes course, a team survival simulation, or even a real mountain climbing expedition.

*"If we can climb the highest mountain in Africa, we will have the confidence to climb any mountain in business."*  
~David Hancock, former Managing Director, Apple Computer

# TEN TIPS

## TO ENHANCE YOUR STRATEGIC PLANNING PROCESS

*This article evolved from my facilitation of several planning sessions in a variety of industries. In addition to my ideas, I am sharing some corroborating quotes.*

*Enjoy... Hollis R. Chase*

## 4 USE TECHNOLOGY

An E-mail system can increase the level of candor and the speed at which decisions are made. Eyeball to eyeball discussions are paramount, but the process of prioritizing, voting and building consensus can be enhanced considerably through technology.

*"Strategy is about stretching limited resources to fit ambitious aspirations."*  
~ C.K. Prahalad, University of Michigan

## 5 TURN THE ORGANIZATION INSIDE OUT...

...and bring outsiders IN! The "power" of the conversation will ratchet up considerably by including key customers and suppliers in all or part of the strategy sessions. When you include them in the teambuilding, wonderful things happen.

*"You gain strength, courage, and confidence by every experience from which you must stop and look fear in the face. You must do the thing you think you cannot do."*  
~ Eleanor Roosevelt

## 6 CREATIVITY AT THE COFFEE MAKER

Allow for down time. Some of the best ideas will surface at the bar, in the restroom or on the golf course. Music, humor, and movement stimulate breakthrough thinking--use them.

*"Vision is not forecasting the future, nor is it walking around with your head in the clouds or peering into crystal balls. It is a creative act. It is creating the future by taking action in the present."* ~Jim Collins, Stanford Business School

## 7 LOOPBACK TEAM

Define a group of employees, customers, and suppliers to "critique" the plan at various stages along the way. Ask them to tear it apart: what makes sense from their perspective, what's missing from their perspective. Your thinking will be stretched along the way.

*"If you want to move people, it has to be toward a vision that's positive for them, that taps important values, that gets them something they desire, and it has to be presented in a compelling way that they feel inspired to follow."* ~ Martin Luther King

## 8 LARGE-SCALE VISION

If the budget permits, and it's feasible, include everyone in a large scale planning process.

*"Strategies take on value only as committed people infuse them with energy."*  
~Phillip Selznick, Sociologist

## 9 USE AN OUTSIDE FACILITATOR

Without sounding too self-serving, I don't know of many management teams that will ask themselves the toughest questions. A talented and independent set of eyes and ears can help you enhance the candor, keep the focus, stretch your thinking and nudge you to make tough decisions.

*"If you have 25 priorities, albeit all of them important, you have no priorities!"*  
~ Tom Peters, Author

## 10 FAST, FOCUSED, FLEXIBLE FOLLOW-UP

I can't imagine anyone going to an athletic club, working out once, and saying, "that's it, I'm done, I'm in shape now." The planning process is an ongoing, always-evolving, never-ending process. I've seen the greatest success when management teams follow up every 90 days.

*"Even the most elegant strategy ultimately degrades to action."* ~ Michael Porter, Harvard Business School