



Strategic Planning: The Picture for the Puzzle

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Have you ever tried to put a puzzle together without the picture of the completed puzzle? In completing a puzzle, it is necessary to get the right pieces in the right places. In most cases, people will give up trying to fit all the pieces together if they do not know the picture of the final product. A strategic plan is the picture that teams use to ensure the organization has the right resources (pieces of the puzzle) and that they are coordinated together and fit together properly.

CHALLENGE

Every organization has obstacles it faces. In many cases, it is the leader that provides the strategic thinking and coordination of resources. The leaders are the ones making sure the right puzzle pieces are coordinated and being put together the right way. The leaders are the ones that have the full picture of what they want the puzzle to look like when it is complete. With the obstacles that organizations face, how can we get the team of people working together better, with common values, where they can achieve a common goal more effectively, with less risk and have more fun?

SITUATION

This business leader was in his early 40's. One of his goals was to have more time with his family. He typically worked five to six days a week and did so 10 to 12 hours a day. He also wanted a structure that would better accommodate his children coming into the business.

His core team was made up of 15 people, but they were never in the same room together. Three or four at a time would talk, but it was typically about lower level issues. The key people were great at their jobs and had great people working for them, but they were focused primarily on their department and not on any other parts of the business. The leader was the one that absorbed information from all parts of the business and coordinated and realigned people, departments and resources (labor and equipment) when needed. He did not want to share any financial information regarding profits or business value with any of his people.

They had some recent successes that had substantially grown the business; however, it was requiring cash flow to grow. To reduce the risk of new accounts they had taken on, they needed to add other customers to diversify. The overseas markets they sold to were becoming more demanding. Customers and suppliers wanted to know what the ultimate vision was for the business (e.g., where was the business going over the next 10 years?)

VISION

Providing the team with the picture - the strategic plan - can result in the organization being less dependent on the leader and get the team to work better together towards common goals. This also allows the leader to have more free time, since the organization is producing increased results with less effort.



RESOLUTION

As a first step, we reviewed the current situation of the organization (competitors, customers, employees, internal issues, leader perspective, and SWOT) with the entire team. This got the team working together and ensured that they all had the same basic knowledge of the business. It was a big surprise how little each of them knew about the business in total, and they very much enjoyed the back and forth from a meeting with all 16 of them in the room.

Next, we developed a Vision of where they wanted to be in 10 years and identified the top five Key Goals that needed to be achieved to truly accomplish their “World Series”. At one extreme was a goal of “\$60 million of gross revenue from 100 “A” customers”. At the other extreme was a goal of “Motivated and Happy Employees with 95% employee retention per year”. Strategies and Action Plans were formulated for each goal and monitored on a regular basis.

The leader in this case is now able to spend more time with his family. The team is engaged with each other and along the way, decided to change one strategy that wasn’t working. They are on track to achieve their Vision and closely follow the metrics in the Action Plans.

APPLYING IT TO YOU

In developing a strategic plan, use a thoughtful process that requires the team to provide ideas and to evaluate options. Full participation results in all options being brought forth at the beginning, so that the strategic plan is stronger in the end and gains buy-in from the team that built it. The resulting product needs to include action plans, a monitoring plan and a communication plan to ensure that the entire organization sees the long term picture and how their role plays a part in achieving the Vision. Having a clear Vision is much more motivating than not understanding how the puzzle all fits together.

If you are interested in learning more about The Strategic Planning Exploration Session and how to develop your team and avoid or escape a declining business and life, contact us to schedule your complimentary Strategic Planning Exploration Session with one of our Expert Guides. We may be reached by calling 800-786-4332 or by emailing us at JSabatini@AppliedVisionWorks.com.

You may also wish to learn more about our unique process for Organizational Leaders called The Comprehensive Independence Builder™, in which we address all of the obstacles you face and then help you use innovative strategies to protect and enhance your organization, improve your quality of life and better achieve your goals. Find out more at: www.appliedvisionworks.com.