

# **FUNDAMENTALS OF STRATEGIC PLANNING**



**INSTRUCTOR GUIDE**

**1-DAY COURSE**

**HRDQ<sup>®</sup>**

**FUNDAMENTALS OF STRATEGIC PLANNING**

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# Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

## Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

## Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

# Course timing

## Module One: The Pillars of Planning

Type of Activity	Segment	Time
	What ensures long-term success?	20
	What is strategic planning?	10
	Why is strategic planning important?	10
	Is strategic planning right for you?	10
	Strategic thinking	10
	Basic steps in strategic planning	10

## Module Two: The Power of a Shared Vision

	Getting ready to plan	10
	What is a visionary company?	15
	Defining your core values	20



Reading



Written Exercise



Facilitation




Group Activity


## Course timing (cont.)


### Module Two: The Power of a Shared Vision (cont.)


Type of Activity	Segment	Time
	Developing a vision statement	20

### Module Three: Powering Up the Double A's: Analysis and Agenda


	Components of a SWOT analysis	10
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	Analyzing your internal environment	20
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	Analyzing your external environment	20
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	Preparing a strategic agenda	15
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### Module Four: Turning Strategy into Action

	Writing goals	10
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	Extracting goals from your strategic agenda	20
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	Writing target objectives	5
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Reading



Written Exercise






Facilitation



Group Activity

# Course timing (cont.)

## Module Four: Turning Strategy into Action (cont.)

Type of Activity	Segment	Time
	Supporting your goals with objectives	15
	Writing action plans	10
	Developing your action plan	20



Reading



Written Exercise

## Module Five: Seeing Your Plan Through

	Getting active with implementation	20
	Monitoring and evaluation	15
	Deviating from the plan	10
	Rewards and celebration	20



Facilitation



Group Activity

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**Course objectives**

- Identify the elements of an effective strategic planning model
- Identify a good foundation for creating a strategic team
- Discover your strengths, weaknesses, opportunities, and threats when setting directions
- Define strategic values
- Participate in a strategic planning effort
- Avoid common pitfalls that derail strategic plans

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## Course objectives

Successful completion of this course will increase your knowledge and ability to:

Identify the elements of an effective strategic planning model

Identify a good foundation for creating a strategic team

Discover your strengths, weaknesses, opportunities, and threats when setting directions

Define strategic values

Participate in a strategic planning effort

Avoid common pitfalls that derail strategic plans



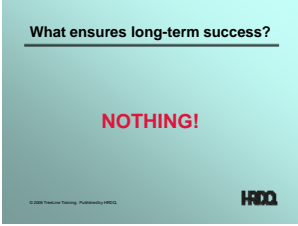


## ModuleOne

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# ***THE PILLARS OF PLANNING***



**Ice breaker activity:** Have participants with partners or in small groups and brainstorm 10 ideas that ensure long-term success in an organization. After participants have filled in the blanks, have them share their answers while you write them on a flipchart.

When they have finished sharing, say to participants that everything they have shared are very important elements to the success of an organization, but there is only one thing that will guarantee long-term success. Begin circling letters on the flipchart from the words that you have been given. Circle all the letters that make up the word NOTHING. Tell participants that many studies have been conducted that show that there is no way to guarantee the long-term success of a company, even the things that they have listed. Even companies with great leaders and skilled staff have failed for other reasons. However, it has been proven that companies that partake in serious strategic planning have a significant edge in being successful over those that don't.

## What ensures long-term success?

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_
- 6) \_\_\_\_\_
- 7) \_\_\_\_\_
- 8) \_\_\_\_\_
- 9) \_\_\_\_\_
- 10) \_\_\_\_\_

# What is strategic planning?

Using the letters below, list any words that you can think of when you hear the words strategic planning. Add your own words in the blank spaces.

**S** \_\_\_\_\_

**T** \_\_\_\_\_

**R** \_\_\_\_\_

**A** \_\_\_\_\_

**T** \_\_\_\_\_

**E** \_\_\_\_\_

**G** \_\_\_\_\_

**I** \_\_\_\_\_

**C** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Use these words to create a list of things that you want to learn from this class.



Strategic planning means different things to different people. To some it means creating vision and practicing values. To others it means setting deadlines for action items and managing changes. Whether you come from the more philosophical end or the task-oriented end, strategic planning does include moving the company forward toward a shared vision through agreed-upon goals and objectives.

Ask participants to use the letters on this page to write down any ideas that come to mind when they hear the words strategic planning.

A company without a strategic plan is like a boat without a rudder. Without anyone at the helm guiding the boat, it will wander aimlessly in the water. A company may have a similar fate — it may be afloat, but not headed in the best direction to ensure its long-term success.

**Without strategic planning ...**

- Organizations may wander aimlessly, or worse, be blindsided by unforeseen circumstances.

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## Why is strategic planning important?

Successful organizations do not allow strategic direction to be set by mistake. These organizations have a well-organized plan that is discussed among key players, including the stakeholders, employees and community. They take into account internal and external influences and make decisions based on fact rather than generalizations.

## Benefits of strategic planning

Clearly defines the purpose of the organization

Ensures the most effective use of resources

Establishes realistic goals and objectives that correlate with the organization's mission

Provides a foundation by which progress can be measured

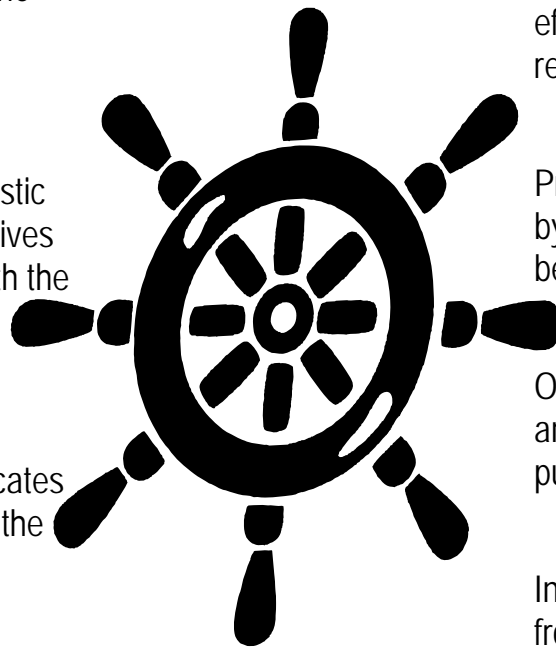
Easily communicates a written plan to the organization

Offers a forum for annual review of purpose and direction

Allows diversity of ownership in the plan

Increases productivity from increased efficiency and effectiveness

Helps solve major problems





# Is strategic planning right for you?

As a general rule, ask these questions when determining when to do strategic planning:

Are you starting a new company or organization?

Are you partaking in a major venture that is new to the company (i.e. adding a new department, adding a new product)?

Have you completed a strategic plan for the new fiscal year? Have you allowed enough time to complete the goals before the coming fiscal year comes to a close?

Have you updated action plans that have been developed in the past?

## Checking for organizational readiness

Interviews with key stakeholders

Focus groups

Written surveys

Open forums



The need for strategic planning is different for every organization. Some organizations that change or grow rapidly should cover all the components of strategic planning once or even twice a year. Other organizations can meet once a year and review only parts of the strategic plan. The difference depends on the environmental conditions and the specific products or services being offered.

Checking for organizational readiness means using the items listed in the workbook to assess the capabilities of the various parts of the organization. The most important element in determining readiness is whether or not the leaders are truly committed to the effort and able to dedicate the necessary attention to the planning and implementation. Employees should be responsive, adaptive, flexible and change-ready, and the organization should have a strong collaborative culture. There should be a willingness to question the status quo and to look at new approaches to performing and evaluating the "business" of the organization. In addition, there should be a commitment of adequate resources for planning and implementation.

**Strategic thinking**



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Start with a blank slate: Forget your own preconceptions about the way you think things *should* be or the way things are currently being done.

**"Inside the box" thinking**



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No idea is too outrageous: Remember that at the beginning of the planning process you are only generating ideas; you are not writing anything in stone.

Generate a lot of ideas: At the beginning of the strategic planning process, the more ideas you generate, the better the chance of finding something that will help the organization.

Monitor your biases: Even if you don't initially agree with an idea, be sure to gather the necessary information to make a sound, logical decision on what direction to take. Sometimes using part of a seemingly crazy idea means the difference between success and failure.

Stay away from task-oriented thinking: This often leads to focusing on internal processes and operations rather than alternative ways of growing the business.

**Optional activity** – Do a brief juggling activity with koosh balls. Juggling draws on a different part of the brain than normally used and can increase creativity.

# Strategic thinking

Strategic thinking means opening up the mind and thinking outside of the box. True visionaries are experts at thinking beyond the boundaries and established comfort zones. Most people, however, are not natural strategic thinkers. Planning for the unknown can be scary and unnerving. Many people would prefer to stay with the status quo than to venture beyond the immediate tasks and processes.

Here are some guidelines for boosting strategic thinking:

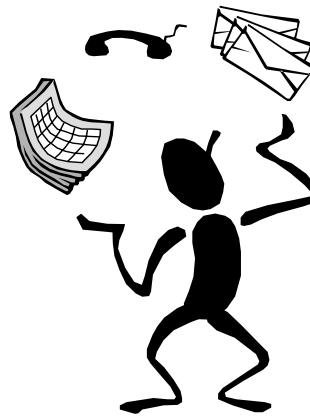
Start with a blank slate

No idea is too outrageous

Generate a lot of ideas

Monitor you biases

Stay away from task-oriented thinking



## Basic steps in strategic planning

- 1) Identify your core values
- 2) Develop a shared vision
- 3) Analyze the situation (SWOT)
- 4) Create a strategic agenda
- 5) Establish measurable goals and objectives
- 6) Establish a strategic action plan
- 7) Associate responsibilities and timelines with each objective
- 8) Write and communicate an action plan
- 9) Acknowledge completion and celebrate success

## Guidelines to strategic planning

Match your organization's culture and way of thinking

Look outside of the box and challenge the status quo

Reflect the environment of your organization

Engage all levels of employees

Provide direction for the organization

Revise to incorporate changes in culture and environment

**Acknowledge completion and celebrate success:** This critical step is often ignored—which can eventually undermine the success of many of your future planning efforts. It seems simplistic to declare that you should acknowledge when a goal is met. However, this step in the planning process is often ignored in lieu of moving on to the next problem to solve or goal to pursue. Skipping this step can cultivate apathy and skepticism—even cynicism—in your organization. Don't skip this step.

### Basic steps of strategic planning

1. Identify core values
2. Develop a shared vision
3. Analyze the situation
4. Create a strategic agenda
5. Establish measurable goals
6. Establish a strategic action plan
7. Assign responsibilities and time lines
8. Write and communicate an action plan
9. Acknowledge completion and celebrate success

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**Identify your core values:** This step begins the important process of thinking strategically and focusing the group on what the organization is about and what is important.

**Develop a shared vision:** This step can be called many different things including mission, vision or purpose statement. It takes the values and begins to put them in a clear, concise, written statement.

**Analyze the situation:** Planners often conduct a "SWOT analysis". (SWOT is an acronym for considering the organization's strengths and weaknesses, and the opportunities and threats faced by the organization.) During this analysis, planners also can use a variety of assessments, or methods to "measure" the health of the organization.

**Create a strategic agenda:** Based on the analysis and alignment to the overall mission and values planners establish an agenda of items that they need to focus on in the strategic plan.

**Establish measurable goals and objectives:** Planners set goals that build on strengths to take advantage of opportunities, while building up weaknesses and warding off threats.

**Establish and communicate a strategic plan:** Responsibilities are assigned for implementation of the plan and for achieving various goals and objectives. Deadlines are set for meeting each responsibility. This information is organized and written in a document that is distributed throughout the organization.

