

The Do's and Don'ts of strategic planning

By Rebecca Staton-Reinstein, Ph.D.

Although strategic planning has been around for years, many leadership teams still stumble in the planning and execution stages. These “do’s and don’ts” are based on the experiences of a wide range of organizations. They’ll help lock in your prospects for success and avoid common pitfalls.

- **DO follow the (modified) KISS principle: Keep it Simple and Significant. Less is more.** Your goal is to create goals and objectives that focus your work for the next year or two. Limit the goals and objectives to one page.
- **DON'T set too many Goals or Objectives or go into too much detail.** Too many details, goals or objectives lead to confusion, conflicting goals, micromanagement and failure to execute.
- **DO follow all of the steps in proven planning methodology as it was designed.** You chose it because of its reputation. Learn from others' success.
- **DON'T skip steps or do them partially.** If you bought an expensive briefcase, you wouldn't change the handle. Avoid tinkering with the process, since you have no data to justify your changes.
- **DO stay focused on the Mission.** It is central for planning and day-to-day execution. Before you accept any goal, objective, strategy or tactic or take action ask, “How will this help fulfill the mission?”
- **DON'T do things because “we’ve always done it,” or if it doesn’t fit the Mission.** Without the mission driving your decisions, you’ll miss innovative solutions, drift off course or become reactionary.
- **DO use the ‘brain dump’ activity to alleviate the urge to begin the Tactical Plan prematurely.** List every idea the team has. Set these ideas (the ‘brain dump’) aside until you are ready to create the tactical plan.
- **DON'T lay out Tasks before the Mission, Goals and Objectives are clear.** The mission sets the context for the goals, which are the context for objectives, specific, measurable results. Choose tactics to achieve these higher level results from your brain dump at the END of the process.
- **DO Measure!** Select useful, significant measurements for all goals, objectives and tactics. Revisit KISS: Keep It Simple and Significant.
- **DON'T avoid measurement because it’s too hard.** Measurement may be difficult, especially when dealing with customer satisfaction, employee morale or effectiveness. Define how to measure these intangibles so you can gauge progress.
- **DO measure quality of results, when possible.** Quality measures how customers judge your products



or services. This gives the best information for strategic decision making and keeps you focused on the mission and customer.

- **DON'T select productivity measures just because they are easier to define.** Important as it is, productivity does not tell you if you are creating a product or service that the customer wants. When you focus on quality, you are more productive, since you reduce costly rework.
- **DO provide support, resources, training, guidance, direction and coaching.** People cannot perform well unless they have everything they need to do the job. The plan is only as good as its execution, which depends on great people management.
- **DON'T dump people into situations without equipping them.** Delegation means understanding what the person needs to get the job done and providing it.
- **DO Manage by Fact:** We are judged by our results. Good planning sets the stage for good performance. Review results regularly to make decisions and manage. When you are not getting results, investigate the root causes and modify your plans appropriately.
- **DON'T manage by intimidation, placing blame or gut feel.** These approaches don't work since people may comply but they won't be engaged. The opposite of the “blame-game” is denial. If a goal or objective isn't reached,

investigate, find the root cause, devise a solution and re-plan. Unfounded hope isn't a strategy for success. Strategic planning works because it disciplines the organization to harness the intellectual energy of all employees and guides the organization in a clear direction. The Plan is the Boss. Following these “Do's and Don'ts” will help you plan and execute successfully. •

© Rebecca Staton-Reinstein, Ph.D., President of Advantage Leadership, Inc., works with leaders who want to grow their companies strategically, transform results and engage employees. She is author of **Conventional Wisdom: How Today's Leaders Plan, Perform and Progress Like the Founding Fathers and Success Planning: A 'How-To' Guide For Strategic Planning**. Learn more at www.AdvantageLeadership.com.