



Strategic Planning

Our clients in the facilities management industry have long recognized that a successful Strategic Planning initiative must ensure that all organizational stakeholders arrive at the same victory at the same time with the required skill and awareness to excel. To achieve this end, modern strategic planning initiatives utilize processes that are:

- Participative - including representation from all key stakeholder groups whom have a stake in the implementation or outcome of planning
- Inclusive – engaging the entire spectrum of opinions, ideas, considerations and aspirations of all participants
- Structured – following a guided approach that funnels participation from surface-level clarity to deep understanding and consensual commitment
- Responsive – formulating strategies and implementation plans that are readily integrated into daily operating procedures
- Evolutionary – maintaining a conscientious schedule of progress updates that consistently measures plan outcomes against expectations and regularly challenges the plan against changing environmental factors

Historically, strategic planning initiatives in the facilities management industry (and beyond) have focused on getting the “right stuff” into the plan at the expense of engaging the “right stuff” behind the plan. While robust plan content is undeniably crucial for plan success the emotional engine that drives the plan is fueled by the sense of collective ownership that is forged while building and maintaining the plan itself. The collaborative or participative approach mentioned earlier is designed to integrate the diverse viewpoints of all participants and foster a unique sense of ownership and accountability for the plan.

Because the ultimate success of the plan is in the hands of the people doing the work, special attention needs to be directed at tailoring implementation efforts to fit the workforce’s style of achieving success. This is accomplished by capitalizing on inherent company strengths while managing unproductive habits, tendencies or practices.

A proven approach to engendering employee support and buy-in for plan success includes selecting and developing key plan leaders and coordinators. With minimal guidance and training these selected employees excel at promoting participation, breaking down inefficiencies that inhibit productivity, and linking individual goals and pride of ownership with organizational objectives.



One client described their experience with Participative Strategic Planning in these words:

"The participative approach to Strategic Planning was chosen to bring new life to our company's planning process. In contrast to our old way of planning in which a small group wrote the plan and announced it to the organization, this process has placed in our hands the responsibility of creating and implementing the institution's guiding strategic directions. In essence, this process has challenged each one of us to keep the plan relevant as a living, action-oriented process. This effort to shift the way we manage our future is nothing short of transformational."

Another client has utilized the power of participative planning as a process model for launching smaller initiatives as well:

"This initiative has not simply been about crafting our plan, it has also provided our organization with a way of pulling people together to operationalize any dream, program, event, initiative or project that requires employee ownership."

Another client wrestled with the idea of including participation from outside the immediate executive team and board of directors. With some hesitation they proceeded. In the aftermath, this is what they concluded:

"When designing our planning initiative, we invited all of the players that would help our company succeed. In a bold move, we then invited some of the players who might stand in our way. Together we came up with a sober plan of action that will get us where we need to go. A key insight for our group was that the strategy of our company is not captured in a plan solely developed by management. Our plan is created and owned by all!"



Organizational Development
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Strategic Planning Process Overview

A Strategic Planning model that has been successfully deployed within individual facility management organizations, trade associations and industry task force initiatives is briefly outlined below. This model is designed to include broad participation (25-35) over a two to three-day period. The Strategic Planning process is traditionally initiated with a brief statement of Leadership Direction and includes an Industry Trends Analysis. The formal components of the process include the following:

The Practical Vision

The vision of an organization is held, in part, by all of its members. Consequently, the breadth of a group's vision is hidden from each member individually until it is called forth and articulated in a group process. A practical vision is a dynamic and evolutionary expression of the group's hope and intention.

Underlying Contradictions

The real issues facing an organization become clear when placed under the light of a practical vision. Without a vision, opportunities and challenges arise without the benefit of a stabilizing context and clear sense of direction. As a group considers the entire range of its issues, root causes can be discerned and quantified for sober consideration. Clarifying the underlying contradictions that stand in the way of accomplishing the vision provides the backdrop for creating viable Strategic Directions.

Strategic Directions

In this session, participants are asked to think strategically. By planning in relation to the organization's actual situation and its identified underlying contradictions, it has a chance to realize its vision. Listing the actions that will deal with the contradictions, and then, combining action arenas into three or four Strategic Directions achieves an economy of effort with high impact results.

Implementation Plan

The success of any plan depends on specifying directions, aligning resources, choosing roles and responsibilities, and building team commitment. By



creating calendars, assigning work teams or committees, scheduling meeting times, and deciding on outcomes, this process anchors the Strategic Directions.

Documentation includes a motivating and relevant One-Year Implementation Calendar and detailed Implementation Worksheets for all projects listed for the first quarter of the Strategic Calendar.

Maintaining the Strategy

90 Day Progress Meetings (Q2-Q4)

To sustain the established momentum, key personnel meet after 90 days to report progress and unexpected shifts in priorities, and to make relevant adjustments. Based on the information reported and using the One-Year Implementation Plan, the group selects the projects to be worked on during the second 90-Day period. Team reports are shared and reviewed by all participants to insure continuity and to promote coordination of efforts. The second 90-Day report date is scheduled at the conclusion of this meeting.

Annual Strategic Plan Renewal

As the fourth quarter of the first year's planning cycle nears completion the planning group convenes for one full-day to reexamine and refresh all aspects of the plan (Vision, Underlying Contradictions, Strategic Actions). At this meeting the next year's strategic calendar is created and the quarterly projects scoped, resourced and initiated.

For more information regarding how participative Strategic Planning can serve your organizational needs, please contact:

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Strategic Planning Process Diagram

