

EXCERPT

Most people would agree that three decades of experience in planning and strategy development qualifies one to propose a “grand theory” of strategic planning. In assuming that, most people would be right—and wrong. Right, because experience does count. Wrong, because grand theories are just that—theories. And overhyped theories, at that. In fact, if my thirty-plus years in the profession mean anything, they are as a testament to the value of a simple strategic methodology. As a businessman and former military strategic planner, I don’t want to be bogged down in a strategic swamp, mired in wasted time and resources, and neither do you. Expensive consultants? A waste; get rid of ‘em. If you, like just about everyone else in business, want to get the most out of the debit side of your ledger, this book is all you need to become an expert strategic planner.

I’ve written **Strategic Planning: As Simple as A, B, C** to lift the curtain on strategic planning. Yes, strategic planning is a must for every entity, from the corner sandwich shop to Wall Street megabanks to the most bloated of government bureaucracies, but I’m here to tell you it is not rocket science—or science of any kind. In simplifying the strategic planning process, I have demystified and rendered understandable and accessible that which has all too often been made out to be unnecessarily complex. Understanding the planning process can be as simple as learning the alphabet. That’s right: As Simple as A, B, C.

The idea behind Strategic Planning: As Simple as A, B, C is to break planning into discrete, manageable tasks, thus making the process easier to grasp and implement. In helping carry out that idea, I will be your personal strategic planning consultant, explaining every step you take, from your first meeting to delivering and implementing your final plan. In addition, I will provide all the supporting documents and briefings you will need, in an editable format, for every step of your journey.

As both a CEO and a manager in the strategic planning field, I have hired contractors at various times to guide me through a formal strategic planning process. In doing so, I have also, unfortunately:

- ✓ Paid a fee of over \$300,000 to a firm that didn’t know what it was doing.
- ✓ Endured many missed deadlines on the part of the planners I hired.
- ✓ Been forced to expend valuable time I should otherwise have been devoting to my organization to giving directions to the contracted

planners. In one particularly egregious case, I became so frustrated that I ended up writing the plan myself.

- ✓ Belatedly realized in most cases that I was extremely dissatisfied with the “brainpower” in which I had unwittingly invested.

I’ve also seen the planning process from the other side and found myself scratching my head there, too. I recall working with organizations, guiding them through the planning process, and not being able to fathom that I was actually being paid, and paid handsomely, for applying common sense to a simple process. There I was, charging money to tell clients something as simple as learning the alphabet: A, B, C.

In a world where all eyes are on the bottom line, this book aims to get you through the strategic planning process at not much more than the price of what you’re holding in your hands. My book will also save you time (which is even more valuable than money) and the squandering of other significant resources, primarily the expenditure of effort and concern on your part and that of your fellow employees.

While my strategic plan approach will prove fruitful to private-sector organizations (such as athletic and academic organizations) and businesses, it will be even more well suited to public-sector organizations, at every level (federal, state, and local), especially given my personal and professional experience working with such organizations. So to frugal public-funded entities of every stripe, I say: we’re all for saving taxpayer dollars, and using this book as your foundation for strategic planning will do just that. I truly believe that every government organization must have a strategic plan.

At its best, strategic planning is visionary and proactive rather than reactive. Moreover, strategic planning is not one thing but rather a set of concepts, procedures, methodologies, tools and techniques, and actions that can help businesses, organizations, and communities become more successful in defining and achieving their mission, vision, and guiding principles for creating significant and enduring public value and worth. Such should be no different for families and other household units. Think about it. Every household should have a strategy for the future: What’s your vision and how are you going to get there? Take, for example, retirement: What is your vision for retirement and given your current resources, how are you going to get there?

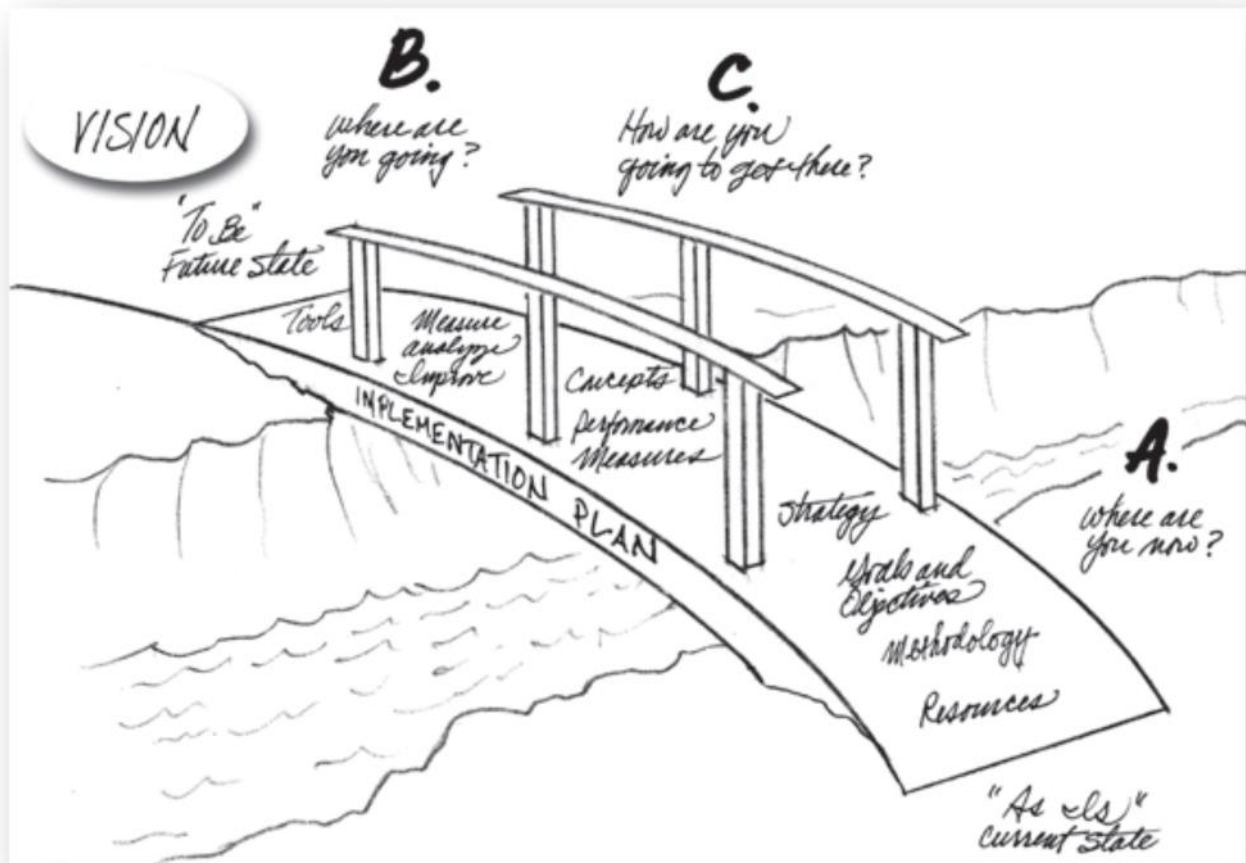
A strategic plan

A strategic plan is a document that provides a formal roadmap for describing how an organization executes a deliberate strategy; that is, where the organization is positioning itself to be over the next few years, and how it

will get there. Again, and not meaning to simplify, developing a strategic plan is as simple as A, B, C. There are three stages in the overall concept of strategic planning. Stage A involves determining your current state, the "as-is" condition of the organization (what I call the baseline). Stage B involves determining your future state, the "to-be" state of the organization. For example, how do you envision your organization in the next five to ten years? What will it look like? Will it still be here? Will it be relevant? Finally, Stage C represents the "how" state: how you are going to get from the as-is state to the to-be state. Stage C includes the concepts, procedures, methodologies, tools and techniques, and actions the organization will carry out to move from its current state to its presumed future state. Stages A, B, and C, then, answer the following questions:

- A: What are you now?
- B: Where are you going?
- C: How are you going to get there?

I submit that answering these questions is truly as simple as A, B, C if you follow the steps outlined in this book. The steps can also be put in the form of a formula, where A = analysis, B = planning, and C = implementation.



Thus, A+B+C = strategic plan success. Consider this approach as a way to bridge the gap between where you are and where you want to be. The strategic bridge graphic shown below illustrates this concept.

As you look at the figure, you (or your organization) are at the right of the bridge (the as-is state), and the bridge (implementation plans, goals, objectives, concepts, procedures, methodologies, tools and techniques, and actions) is the path to the other side (the to-be state). See? It's as simple as A, B, C!

Asking and answering our A, B, C questions requires an ongoing, deliberative conversation among dedicated strategic planning team members and key stakeholders in your organization. Strategic Planning: As Simple as A, B, C provides a model of strategic planning that will help your organization develop a process that can ensure organizational relevance, public worth, profitability, and success in both the organization's day-to-day and long-term life. If carefully followed, the A, B, C process will empower your organization to deliver a strategic plan that can profitably shape its future for a decade to come, or more.

Consider the examples of "lifetime" brands and organizations that remained stagnant and eventually failed. Kodak is one of the more infamous examples that comes to mind. Here was an iconic company that was stuck in the present, if you will, failing to implement change to keep up with, let alone overtake, the more technologically determined and visionary players with which it found itself competing, unsuccessfully, as it turned out. At one point, Kodak was the undisputed leader in photography, focusing as it did for most of the twentieth century on film, camera, and paper production. Then, when digital photography became the new future, Kodak failed to adapt and was eventually forced into bankruptcy. One can only assume the onetime "king of photography" believed it had achieved lasting perfection, and, thus, said to itself, why plan for the future? If, on the other hand, you or your organization doesn't believe you have reached perfection, continue reading. Organizations should anticipate change rather than adapt (or worse, fail to adapt) to it after the fact. As a business owner or a manager of a public entity, you should dedicate your tenure to developing a strategy that allows the organization you lead to navigate from the as-is to the to-be state—to anticipate the new environment before it's too late.

Strategic planning is a tool for you to adapt—a tool with three winners: the owner/manager (the one who gets most of the credit for success), the customer (your organization's reason for existence), and the employee (without whom the organization cannot function). Below are some of the benefits of creating and implementing a strategic plan:

- ✓ Increased effectiveness
- ✓ Increased efficiency
- ✓ Improved understanding of the organizational environment and growth
- ✓ Better decision making
- ✓ Enhanced organizational capabilities
- ✓ Improved communications and public relations effectiveness
- ✓ Increased political, community, and consumer support
- ✓ Improved relevancy of and within the organization
- ✓ Improved organizational and employee growth
- ✓ Improved organizational culture
- ✓ Increased compliance with environmental changes

Those who develop a strategic plan will always be ready; those who do not will always be surprised. Don't be the one who's always surprised. Don't be a Kodak. If you stick your head in the sand, you become easy prey.

With the strategic plan approach and strategic planning model, you and your team will have the roadmap, tools, depth of knowledge, and experience to develop a strategic plan at minimal cost and on time. Plan now to start planning. It's As Simple as A, B, C!

Together, let's build your strategic bridge.