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Getting Involvement in Your Strategic Planning Process

By A. Paul Bradley, Jr.

“With involvement comes understanding, and with understanding comes commitment.” This is an axiom often quoted by speakers on strategic planning. But like many fundamentals, achieving meaningful involvement, while seemingly easy, is actually very difficult.

In last month’s THE PRESIDENT, I wrote about how the flattened pyramid and, in some cases, greater span of control of the CEO have led to strategic planning teams of more than ten persons, although ten is considered by many to be the maximum team size. For the planning leader, this requires new approaches to the process to make it work. Likewise, there are continuing challenges to achieving real involvement in building widespread “ownership” of the plan.

The “Demand to Know”

Yankelovich’s research has observed a change in life values among Americans. Based on survey research, it has identified a “demand to know” among a large percentage of the population. In recent years, we have seen evidence of this hypothesis accumulate. People seem to expect information on everything although, ironically, they may not do anything with the information they receive.

As a management consultant, my role is not necessarily to understand fully the reasons behind every change, but rather to make sure that my clients respond effectively. Certainly, there are many practical reasons for keeping people informed and involved in decisions. The extensive research supporting the relationship between wide involvement and better decisions is compelling. So too is the evidence suggesting that people who demand involvement but are rebuffed may leave the company, especially the talented. In these times of labor shortages, the loss of anyone is a serious problem. Thus, to me, the involvement of many people in strategic planning is no mere convenience. Rather, involvement is essential.

Some Answers

Here are some ways of involving people in planning that have been successfully used in many companies in several industries. They are not a complete answer, but they will help, especially if used together.

1. Before taking the top team away to a planning retreat, have every manager poll the ranks for ideas. You might ask for suggestions on strategies, potential opportunities, worrisome weaknesses, or the like. Keep the request simple and probably confined to one of these categories. You may even want to require a response from everyone. This forces even the shyest to respond. Make sure that these ideas are distributed to all retreat members and incorporated into the discussion.

2. Share the results of the retreat session with those who did not attend. Planning teams normally meet at least twice. Between meetings, there is time to dig up missing data and to think about ideas that came from the first session. But this interim period is also an ideal time to share the results with those who were not there. The report should include a discussion of the mission, perhaps strengths and weaknesses identified, some key assumptions, maybe the key result areas, and an unedited list of strategies. All managers should review the report with their teams. I generally recommend each manager and group make a minimum number of additions in each area, thus again “forcing” fresh thinking. These sessions do complicate the process, but they also improve the quality of the plan and reaffirm your commitment to involvement.

3. Spend time at the next retreat assimilating the new ideas. While some action-oriented managers object to this, experience has shown that everyone – including those anxious to get on with the business – benefit from the time spent. As people discuss the new ideas, their thinking sharpens, syntheses occur, and a stronger final product begins to take shape.

4. After the plan is completed, compile a report that shares appropriate decisions from the plan. In a cover letter, you should thank everyone. The more specific the acknowledgment, the clearer it is that the planning team paid attention to the ideas from those not on the retreat. This step should be easy; examples should abound of how people throughout the organization helped.

The result will be a plan with wide “ownership,” and everyone will want to see it succeed. Throughout the year, a means of gaining involvement is “skip-level” meetings. One proven technique is for the CEO to almost randomly select eight to ten people for small group discussions. This is an excellent opportunity to both gather ideas and visibly affirm interest in them. To reap full benefit, make sure that people know what you are doing. Nothing is so discouraging as reading in an employee survey six months later that “we were not involved in the plan,” and yet it can happen when a CEO is shy about intentions.

Making it Happen

The suggestions above will seem obvious to many readers. They are. But few CEOs make certain their managers follow these steps. Typically, one or two department heads will effectively involve their people, with the end result of heightened morale and better follow-through. Other managers will be “too busy” with day-to-day matters, too disorganized, or too controlling, and the company as a whole will suffer. Actually, it can be damaging when some departments get fully involved while others are left out. The latter groups’ members feel like second-class citizens. This must be avoided at all costs.

As CEO, you have a nondelegable responsibility to ensure that the planning process is effective. Thus, an ironic paradox comes to play: You may have to autocratically insist on full participation in order to completely realize the benefits of your planning process. ★

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