

THE PRESIDENT

A Publication of the American Management Association for Members of the Presidents Association

The Challenge to Efficient/Effective Planning

By A. Paul Bradley, Jr.

Conventional wisdom among strategic planning process leaders and facilitators suggests that the size of a planning team be limited to ten participants. But as the typical organization structure has been flattened, this restraint has become problematic.

As layers within organizations have been slashed, sometimes as many as 18 managers report directly to their president. And the CEOs rightfully feel the need to include all these managers in the strategic planning process. Indeed, I now have led tens of planning processes in which the corporate presidents found themselves unable to reduce the planning teams to ten. Further, companies increasingly are coming to agree with the axiom that people will pursue with greater commitment those activities in which they have ownership. To a planner, this means that everyone on the team must be involved in every key decision.

A Speech Class or Brawl?

This represents a real but not impossible challenge to effective and efficient planning. A discussion involving from 16 to 18 people is seldom a discussion. It tends to be a speech class at best, a brawl at its worst. But neither need be the case. It is possible to involve everyone in a meaningful way.

To illustrate, a few years back I led the National Futures Conference of the American Heart Association. At the conference, we had 268 volunteers and professionals as our planning team. How did we reach consensus at this meeting? We went through well-

organized interactive cycles for two days until all agreed to the directions that were chosen.

Modifications like this one can be made to allow large planning teams to achieve full involvement, consensus, and commitment to strategic plans.

Some Answers

Here are some thoughts on techniques to try if you find that your planning team must be large:

1. Do not sit as a total group all the time. Repeatedly break into smaller groups. Have each group report back after a specified period, then discuss the various reports. When an issue appears that the entire group cannot resolve, select a subgroup comprising both sides and give it a set time to recommend a compromise. Always get the total group's approval before accepting a report as final. This will prove easier than it might seem. The break-out sessions give everyone input, and the report-discussion sessions bring synthesis and consensus.

2. Use a variety of idea-generation techniques. For example, the "nominal group technique" (that is, a "group" in name only) requires everyone to contribute – no abstentions. This method has everyone sitting together but silently writing ideas before presenting them one-by-one for discussion. Similarly, a Delphi technique in which people pass in ideas, then vote silently ensures total anonymity of ideas so that even the quietest of participants gets a voice. In creative idea generation, the quantity of suggestions breeds quality.

3. Regularly mix your subgroups. This may mean having non-experts working on a particular issue. However, Rosabeth Moss Kanter's notion of "kaleidoscopic thinking," wherein strangers to a topic often provide the most creative insights, proves true over and over. The experts will have their

day. Now let the amateurs stretch their minds a bit and watch the exciting results.

4. To reaffirm an old truism, the CEO should never lead the planning process. The CEO should sit back and silently ask two questions: Is this where we need to go? Are these the people who will get us there? Planning continues to be both a magnificent team building experience and a means of seeing the management team in a different light from the day-to-day operational activities. The CEO's role is to ensure that effective planning takes place. It is not to personally facilitate the process.

Strategic planning is a process by which you truly create your future. It is important for the entire top team to engage in the process and personally commit to the objectives, strategies and actions. Do not let yesterday's planning process rules – like "no more than ten" – interfere with what is perhaps the most important rule of all. As Dwight Eisenhower is believed to have said, "Planning is everything, the plan is nothing." ★

A. Paul Bradley, Jr. is president of The Bradley Group Inc., a Saratoga Springs, New York-based consulting firm offering help in strategic planning to companies of all sizes. Bradley is also a speaker for The Presidents Association of AMA.

© A. Paul Bradley, Jr.