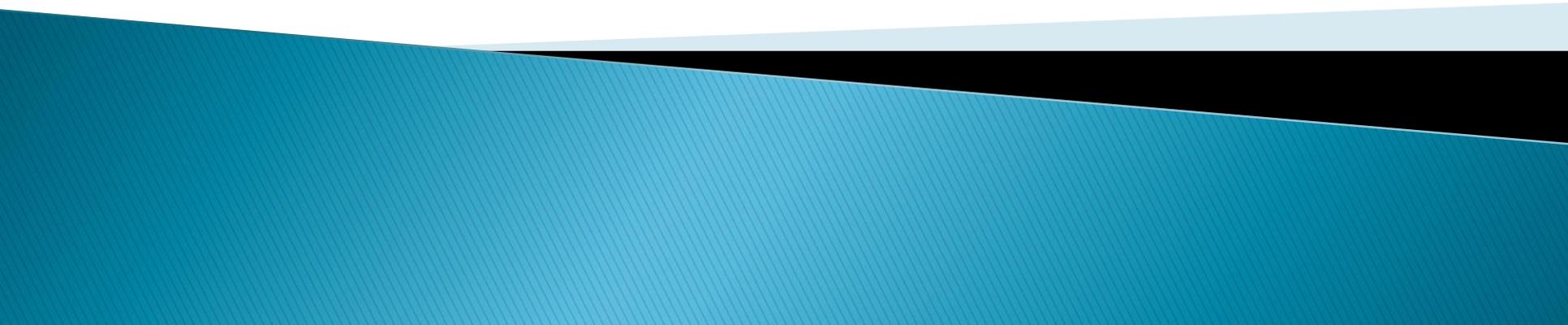


Unit 12: Strategic Planning

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Content

- ▶ Learning Objectives:
 - ▶ Ac. 4 Be able to construct a strategy plan for an organisation
 - 4.1 propose a suitable structure for a strategy plan that ensures appropriate participation from all stakeholders of an organisation
 - 4.2 develop criteria for reviewing potential options for a strategy plan
 - 4.3 construct an agreed strategy plan that includes resource implications
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In This Lesson

- ▶ Learning Objectives:
 - ▶ Ac. 4 Be able to construct a strategy plan for an organisation
 - 4.3 construct an agreed strategy plan that includes resource implications
 - ▶ Assessment Criteria
 - ▶ Further Readings
 - ▶ References
- 

4.3 construct an agreed
strategy plan that
includes resource
implications

Emergent strategy

- ▶ A perfectly emergent strategy is characterised by order, but in the absence of intention about it (innovaders.com, 2016). It is although difficult to imagine action in the total absence of intention. Emergent strategy does not mean chaos, but in essence *unintended order*
- ▶ Mintzberg and Waters (1985) expect that purely emergent strategies are as rare as the purely deliberate one. It is more likely to find tendencies in the direction of deliberate and emergent strategies rather than perfect forms of either.
- ▶ As a consequence of the above, the authors see emergent and deliberate strategies as two poles, where different types of strategy can be said to exist in the space between them.
- ▶ They introduce the following strategies, where the first strategies fall closest to the deliberate strategy-pole and ending in the last strategies closest to reflecting the characteristics of emergent strategies.

Strategic Planning Template



Adopted from: Hansen, 2008

Strategic Plan elements

1 Introductory Statement

2 Background statement/history

3 Management Board and Staff

4 Organisational Tenets.

4.1 Organisational Vision

4.2 Mission Statement

4.3 Values

5 SWOT Analysis

5.1 Strengths

5.2 Weaknesses.

5.3 Opportunities.

5.4 Threats

6 Major Goals

6.1 Specific Objectives

7 Evaluation

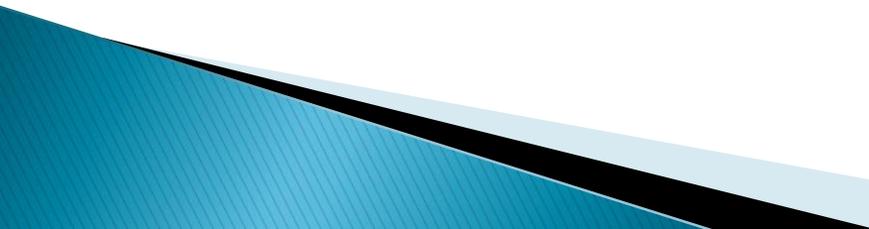
7.1 Formative Evaluation

7.2 Summative Evaluation

Source: Hansen, 2008



Introductory Statement

- ▶ According to Hansen (2008) on the first page, perhaps even on the cover of your plan, you need to indicate just what it is about and who the authors of the plan are. Hence you may want to complete a statement rather like the one below. Remember that your organisational logo might look pretty splendid in there somewhere.
 - ▶ This strategic plan has been developed by XYZ group in order to provide a disciplined approach to the management of XYZ group over the next ABC period of time.
 - ▶ Contact details.
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Background statement/history

- ▶ It's always useful for somebody reading your strategic plan to be able to discover at least a little bit about the organisation. Hence, the need for some concise and pertinent pointers about your agency (Hansen, 2008). Remember, the idea is not to write a novella but instead, the challenge is to be able to provide a paragraph or three about these sorts of questions:
 - When was the organisation formed and why?
 - What led to it being formed?
 - What key changes have occurred since it was formed?
 - How is the organisation governed and how is it staffed?
 - What support is received from which agencies and what level of support has been received?

Management Board and Staff

- ▶ For this section, Hansen (2008) suggest outlining the structure of your agency is important in two quite distinct ways. First, a newcomer, or a visitor or even an auditor should be able to see at a glance what the management structure is for your organisation, both at an operational (staffing) level and at a governance (board) level. Second, the exercise of recording the way in which your structure operates (i.e. determining and recording who links to whom, for what purposes and with what forms of accountability) means that you will have reviewed such matters, perhaps for the very first time. So here are some suggested tasks:
 - List who is who and draw an organisational chart.
 - Perhaps have some biographical details about each person or even a photograph and contact details.
 - It might be very useful to have such information vetted by the individual before going public.
- ▶ Remember to also indicate representation on external agencies and identify representatives from external organisations.
 - It's folly to overlook external agencies – especially the ones who might be the benevolent benefactors
 - Again, biographical and/or organisational details and contact matters are important but have those snippets of information validated first

Organisational Tenets

- ▶ Hensen (2008) indicates that fundamentally, it's about the guiding principles, the organisational beliefs, the behavioural creed to which you subscribe but for a strategic plan it is generally divided into three distinct elements:
 - the organisational vision (what you want to become) (see LO 5),
 - the mission statement (what you want to achieve overall as an agency) (see LO 5)
 - values (the standards of belief that you adopt and which shape the way in which you present and behave as an organisation) (see LO 5)

Analysis

- ▶ Tidyforms.com (2016) provides the following guidances in developing your Plan:
 - ▶ Current Situation
 - Clearly and concisely present the current situation with any contributing history, and any trends, cycles, changes or future developments that are relevant
 - ▶ Key Issues
 - Clearly define the most urgent and important issues as they relate to the current situation for this Section, and the overall purpose of this plan and the company's Mission. Key issues are usually those strengths, weaknesses, opportunities, threats, capability gaps and impediments that impact on business performance

Analysis

- ▶ Your analysis can take any of the forms discussed in previous Learning Outcomes. You can summarise what was done and represent it in a table form to insert in your Plan.
- ▶ Hansen (2008) recommends a SWOT Analysis which is a 360 degree scan, a reconnaissance, a bit of a sticky beak at what's going on. They all involve appraising the status quo as a predicate to determining planning goals and setting developmental priorities.
- ▶ You can also use the PESTEL/STEEP Analysis to contextualise your Strategy Plan.

Analysis

- ▶ According to tidyforms.com (2016) you need to conduct a detailed analysis across each of the following areas to identify and quantify key market opportunities/gaps, barriers to market entry, threats, compliance requirements, risks, performance multipliers, critical success factors etc that must be considered when developing high priority product development, marketing and business strategies.
 - All budgetary and financial constraints must be factored in to this planning.
 - Global/National Trends, Developments, Cycles and Changes of Relevance
 - Macro-environment (eg, political, economic, legal, social/cultural, demographics, technology)
 - Industry
 - Markets, Customers and Suppliers
 - Competitors and their Products

Major Goals

- ▶ Major goals are broad overarching aspirations that should be consistent with your vision and mission statements. Quite simply, goals are broad statements of overall intent. The next series of elements provide duplicated tables that can be used for planning. You can approach this task in one of two ways (See LO 5):
 - specific objectives and have individual people fill them in for each goal they'd like to see addressed.
 - Alternatively, create working groups and have them address a specific set of goals and derivative objectives.
- ▶ Whichever way you work is over to you but remember that you will need to bring the goals together if only to prioritise them and also in order to have them validated by your strategic planning team.

Monitoring and Evaluation

- ▶ See LO 5

Further Reading

1. One-Page-Strategy-Plan Template see <https://www.gazelles.com/g/one-page-tools/strategy>

References

- ▶ Hensen, Jens J. (2008) Strategic Plan for Dummies, Woodhill Park Retreat, 2008 retrieved from http://www.edmonton.ca/programs_services/documents/PDF/StrategicPlanningForDummies.pdf
- ▶ tidyforms.com (2016) Strategic Business Plan retrieved from <http://www.tidyforms.com/download/strategic-plan-template-3/page-9.html>