



"If you don't know where you are going, any road will get you there."

Lewis Carroll

When I first conducted a strategic planning process and facilitated a hospital board retreat in 1986, forecasting was fairly easy. Without all the rapid changes experienced today in both internal operations and the external environment, organizations could be fairly comfortable knowing that planning for the next 3-4 years could be done with some accuracy. Today you are lucky if a strategic plan remains valid 18 or even 12 months from when you begin the process.

The fortunate thing is that access to information and technological support has also changed drastically over these many years. Transparencies with paste-on letters have been replaced by PowerPoint slide shows. Websites in addition to books and periodicals offer insightful views into the challenges and issues in most any industry. Wireless decision support handsets, on-site instant cell phone surveys, laser pointers, and white boards that print what has been written on them are just some of the new technologies used to improve knowledge transfer. However, having access to more research and information and these sophisticated new tools can actually get in the way of the hearty discussions that board members need to have when planning the strategies to pursue.

We've found these techniques to be most helpful when we guide clients in their annual strategic planning board workshops and retreats:

- ✓ **Survey your board members and other stakeholders in advance.** This has the dual advantage of:
 - Collecting opinions and insights in advance should the individuals surveyed be unable to attend on the planning day, and
 - Enabling the facilitator to report survey results in the aggregate so respondents can be quite open in sharing their feedback which might not occur in an open meeting.

- ✓ **Confirm the board members share an understanding of the organization mission and vision.** Often we discover that more than one board member views the overall objective that is driving or steering the organization differently than other board members. A common vision is crucial to identifying aligned and coordinated strategies that will enable the organization to achieve its short and long term goals. It's not unusual for us to spend a good deal of time at the planning retreat or workshop hammering out a vision that facilitates and guides strategy creation and the resulting action plan that some organization request.

- ✓ **Look as intently at the inside of the organization as at the outside environment.** Frequently we are asked why we need financial statements and employee turnover ratios when we are meeting with the client to collect materials we use in a board planning workshop. Without a thorough review of what is going on inside (human resources, financial resources, product and service sales, etc.) and outside (industry trends, innovative competitors, collaborators, market share, etc.), it is too easy to plan in a vacuum and miss critical observations so important to ensuring an organization doesn't get blindsided.

A visit to your local library will turn up numerous texts that reinforce these points and offer other ideas on how to prepare for and guide the annual board strategic planning process. You'll also learn about special techniques like using scenarios to improve the reliability of longer term plans, hardwiring strategies to the action plan, evaluating the success of your programs, products or services, and determining in advance the likely success of a new initiative.

As Lewis Carroll points out, "know where you are going so you pick the right road". Let us know if we share our experience. Drop me a request for examples of some of these planning tools that we maintain and use at the Health Council for our clients. kpeach@hcecf.org or 407.977.1610, extension 222.

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