

KrasnePlows Newsletter

Plan. Partner. Lead.

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Ever notice how strategic planning proposals often look alike? Perhaps even more disconcerting, many finished plans seem interchangeable. This may sound familiar; we talked about this phenomenon, when we tackled similarities among consultants in our [March issue](#). Some critics maintain traditional planning is too expensive, takes too much time and often misses the boat because the completed project doesn't consider financial sustainability.

We've noticed an uptick in planning activity in recent months and think it's worth exploring how to make such exercises more useful. Successful planning engagements share key ingredients. It's important to recognize them so you can increase your probability of success and keep from squandering precious resources. We dedicate this issue to some observations about successful strategic planning and possible alternatives.

Successful Strategic Plans: Critical Ingredients

Strategic plans are useful, but only if you can execute them. How can you be sure? You'll have a leg up if your planning process includes the following:

Realistic Goals: Establish goals backed up with objective evidence. Don't rely exclusively on internal perception. Consider your organizational strengths and weaknesses, funding opportunities and limitations, and market realities so you know whether you are developing achievable goals.

Financial Analysis: Assess your organization's financial health and develop budget projections so you can consider your financial sustainability. Make sure that your assumptions are reasonable. Otherwise you are building your plan on quicksand. If revenues are too low, expenses too high or capital needed is too scarce, you may want to re-evaluate your strategic goals or the way you expect to achieve them.

Road Map: Map out the steps to take, when and who will take them. Make sure that the tasks are in sync with the resources you have available or can acquire. Establish a way to monitor progress and use it, so leadership knows if the organization is on target or whether it needs course corrections.

Plan Ownership: Your board, management and staff must own the plan. The planning process is as important as the plan itself. Any process should elicit ideas, information and questions from participants; incorporate relevant data from program, peer group and other stakeholders; and foster candid discussion, so leadership can make informed decisions with palpable commitment.

More Than One Way to Skin a Cat

Traditional strategic planning may not be the answer for some groups. Many leaders struggle in a world where funding models no longer work; a constantly changing environment makes 5-year planning horizons nonsensical; and organizations need decisions immediately.

Alternatives do exist. We've seen leaders focus on a defined set of issues over shorter time horizons successfully without spending an arm and a leg. Leaders can make directional, yet strategic decisions that can propel organizations forward. And they can develop plans quickly, which they can use the next day.

Industry expert Jan Masaoka offered various alternatives like employing strategic learning agendas, logic models, theories of change, and community-based decision making, in *Blue Avocado's* recent series, "Strategic Planning: Failures and Alternatives".

Strategy by Design

We offer our own, road-tested, *Strategy By Design* solution. Its 3-step, data-driven process is a more intensive, yet less expensive and faster approach that helps leaders make key decisions and start taking concrete steps within weeks.

Strategy by Design sets the stage, whether you anticipate additional long-range planning or want to re-calibrate midway through a current plan. You can read more about *Strategy by Design* on our [website](#).

Thinking about planning? Don't limit your approach to a traditional planning process. Explore the alternatives and make your decision in light of what you want to accomplish, the issues you want to address and the resources you have available. There is more than one way to skin a cat!

We Want Your Knowledge! Let us know what you are doing to increase your impact, whether your grant-making, program effectiveness, leadership or organization's productivity. Your insights can help strengthen the sector.

Next Issue: Leadership – Do You Really Know It When You See It?

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Ever Wonder How Important Your Staff is to a Change Project?

According to researchers, employee engagement is a key success factor for organizational transformation. In a recent McKinsey & Company study nearly 100% of respondents who described their organizations' change management initiatives as extremely successful said staff had input in shaping those efforts.

Source: [What Successful Transformations Share](#)


KrasnePlows
Crystallize Strategy & Ensure Execution

*Barbara Krasne and
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