

SMART PLANNING: GETTING CLEAR, GETTING FOCUSED

The Roberts & more Smart Planning approach breaks many of the rules of traditional strategic planning. No ponderous processes...no endless meetings...no lengthy, complicated documents. Smart Planning is quick; it is easy; and it results in a precise road map to the future. Ten principles anchor the Smart Planning process.

1. Good planning answers three simple questions:

- Where are we now?
- Where do we want to be?
- How do we get there?

2. Planning doesn't need to be exhausting nor complex. Compelling objectives and priorities may be easily articulated through a relatively simple process. Our ability to harness the energy and insights of your team is key to the success of the Smart Planning process. It is their best thinking that will determine the power of the plan.

3. Planning should focus on answers to the most important questions facing an organization.

Simple brainstorming with yellow Post-It notes surfaces good ideas, but doesn't build consensus around priorities. We identify critical questions, and the answers to those questions naturally translate into our vision, goals, objectives and priorities.

4. The plan must be "our" plan, not just the plan of a CEO or a board of directors and not just a staff plan. If all parties are involved in creating the plan, they are more likely to become advocates – owners of the plan.

5. A "promise" is a stronger way of articulating a mission. Mission merely describes the core business of the organization. It tells what it does, not why it's important. A promise is what stakeholders and others expect on a consistent basis. It is more about benefits than features; it is how the organization adds value to its key constituencies.

6. Values must be closely linked to organizational priorities. Values are important and timeless, but are only useful if they connect with objectives and priorities. For example, if "diversity" is a value, then the plan should include attention — in some way — to achieving diversity. Without the connection, values become empty rhetoric.

7. **Most people can't explain the difference between a goal and an objective.** Nor can they make the distinction between a strategy and a tactic. Because it's always confusing, it is better to simplify the plan structure and focus teams on what exactly needs to be done to reach our objectives. We develop one three-year goal, 3-5 objectives and priorities for each objective. Priorities may be strategies, tactics or tools. It doesn't matter as long as they are essential to success.
8. **The traditional SWOT analysis is an ineffective tool.** It inadvertently tends to focus the conversation on threats and weaknesses. Rather, Smart Planning identifies significant opportunities in the environment and the realities/ vulnerabilities that limit our ability to seize those opportunities. The result is an emphasis on the positive rather than the negative with clear choices about directions and priorities.
9. **The easiest way to measure progress is to complete the statement "We will have succeeded when..."** Evaluation is an important component to planning, but metrics are often complex and sometimes meaningless. By completing the above statement with a set of bullet points, we are able to quantify our achievements simply and clearly.
10. **Planning is most effective when it allows for flexibility and creativity.** People don't generally think in a linear manner; thinking is more circular and chaotic. So, the process should accommodate continuous input from beginning to end. Even the most competent leaders have short attention spans. Also, the time between sessions gives participants the opportunity to think about the discussions and to return to the second meeting with new ideas.