

On-Site Visit Strategic Planning Proposal

Developed By

Dr. Fred R. and Forest R David, Authors and Consultants
P.O. Box 8139
Ocean Isle Beach, North Carolina 28469
910-579-5744
910-612-5343 (cell)
www.checkmateplan.com
freddavid9@gmail.com

January 10, 2010

Copyright 2009 by Dr. Fred R. David

On-Site Visit Strategic Planning Proposal

A strategic plan is a document that reveals an organization's vision, mission, external opportunities/threats, internal strengths/weaknesses, objectives, and strategies for the future. Strategic planning is the process of preparing this document. This proposal outlines a process for strategic planning that has been used successfully by Fred and Forest David is assisting organizations.

Reasons for Doing Strategic Planning

Strategic planning provides direction and purpose. When an organization actively engages in strategic planning, the members and constituencies usually become more committed and supportive because they understand more fully what the Association is trying to accomplish and why. Constituency groups of the firm include clients, businesses, partners, nonprofit organizations, donors, employees, manufacturing plants, managers, administrators, accrediting bodies, and creditors. Any or all of these groups may ask "What is the Plan" and expect a good answer. In fact, their support for the firm may hinge on the answer. Although not guaranteed, funding and support for an organization typically follows a clear strategic plan, because constituencies can see the benefits the firm strives to provide customers, the community, and others.

Reasons for doing strategic planning include the following:

- Enable the firm to be prepared for reasonable eventualities and to anticipate changes needed.
- Enable the firm to influence, initiate, and be proactive, rather than simply reacting to events as they occur.
- Enable the firm to achieve maximum effect from a given effort.
- Enable the firm to take into account relevant factors and to focus on the most critical ones.
- Enable the firm to obtain the resources needed and carry out tasks in the most efficient manner possible.
- Enable the firm to conserve its own resources and be seen as an effective, useful entity.
- Enable the firm to identify who, what, when, where, and why of operational details needed to achieve desired objectives.
- Enable the firm to assess whether the effort, costs, and implications associated with achieving desired objectives are warranted.
- Enable the firm to avoid the trap of working hard but achieving little.
- Enable the firm to obtain and keep certification or accreditation

T

he Proposed Process

Strategic planning is a logical, distinct process. The eight steps described below represent a systematic, rational, objective approach for formulating a strategic plan, rather than relying upon politics, emotions, opinions, and subjectivity to determine an organization's future. Fred and Forest are experienced facilitators in this process.

If selected to assist the firm in strategic planning, Fred and Forest would travel to meet with the firm's strategic planning participants on three occasions as described below. Most of the interaction between the facilitators and the strategic planning participants will be by email as indicated below. This entire strategic planning activity can be completed within six weeks. Up to twelve participants could participate in the planning activity.

Step 1 – Meeting 1 – Fred and Forest will initially meet with the firm's strategic planning team to field questions about the process to be undertaken to develop a strategic plan for the firm. They will seek support, approval, and suggestions regarding the process to be undertaken and will answer any questions and make changes in the process if asked. They will develop and distribute a tailored Strategic Planning Workbook to each participant. This initial meeting will last 2 to 3 hours.

Step 2 - Each participant person will contribute (submit) strategic planning input to Fred and Forest in eight key areas: 1) Vision Statement, 2) Mission Statement, 3) External Opportunities, 4) External Threats, 5) Internal Strengths, 6) Internal Weaknesses, 7) Objectives, and 8) Strategies. Following Meeting 1, participants will use the Workbook to submit their input within two weeks via an attached email Word file to Fred and Forest (freddavid9@gmail.com), or if preferred, a participant may call Fred or Forest and provide input orally rather than in writing (910-579-5744). Confidentiality of all input is strictly guaranteed either way! This process is economical and effective and has been used successfully by Fred and Forest in assisting organizations in strategic planning.

Step 3 – Fred and Forest will compile/combine/assimilate/condense the individual responses, **on a no-name basis**, into one large document, so that NO response or comment is attributed to any particular person. They will then email this no-name consolidated input document back to all participants in the process. Each participant then will print the file, review the information, and then with an ink pen place checkmarks directly on the document beside the particular vision and mission he/she feels is best for XYZ to adopt. Also with an ink pen, each participant will place checkmarks beside the Opportunities/Threats and Strengths/Weaknesses and Objectives, and Strategies that he/she feels are most important for success of the firm. Prioritization is an important part of strategic planning.

Step 4 - Participants should send the document with checkmarks indicated to Fred or Forest via mail, email or fax (910-579-5132). The facilitators will tally the number of

checkmarks and in this manner produce a prioritized, consolidated input document. The process being described here minimizes the time required from participants in meetings.

Step 5 – Within two weeks, Fred and Forest will email back to participants the prioritized, consolidated input document, so that everyone can see the collective best judgment of the group.

Step 6 – Meeting 2 – Fred and Forest will return on-site to meet with the participants to discuss the prioritized, consolidated input document. During this meeting, the facilitators will take notes as participants discuss the relative importance of various issues, factors, trends, facts, objectives, and strategies in the document. This meeting will last 3 to 4 hours.

Step 7 – Within two weeks, Fred and Forest will prepare the firm’s tentative Strategic Plan and will email this to all participants who should print and review the document.

Step 8 – Meeting 3 – Fred and Forest will return on-site to meet with the participants to finalize the firm’s Strategic Plan. Implementation issues will be discussed at this final meeting. This meeting will last 3 to 4 hours. Fred and Forest remain in direct contact with the participants as implementation of the strategic plan unfolds.

Conclusion

Rudin’s Law says “When a crisis forces choosing among alternatives, most people will choose the worst possible one.” A primary purpose of strategic planning is to avoid a crisis, allowing the organization to anticipate, initiate, influence, and be proactive in determining its own future. Ownership of strategies by those who have to execute them is a key to success; ownership comes through participation.

The firm’s strategic planning participants will contribute as much input as possible in this process. A basic tenet of the process outlined herein is to “plan with people, not for people.” This approach used by Fred and Forest is much more effective and economical than hiring a group of outside consultants to “become experts” about the firm and its market, and then develop a strategic plan for the firm, and then deliver that document to the organization. In contrast, the process outlined herein capitalizes on the vast knowledge that leaders and employees of the firm already have and uses this information to develop a clear Strategic Plan. Fred and Forest will lead the organization in this process by facilitating, coordinating, organizing, assimilating, directing, and assisting participants in producing and supporting a clear Strategic Plan for the future. The resultant document will be the firm’s Strategic Plan, not the facilitators’ strategic plan, because participants will have developed the plan.