



# Strategic Planning

Context and Process

Clore Duffield Leadership Programme Short Course  
Ashridge Business School  
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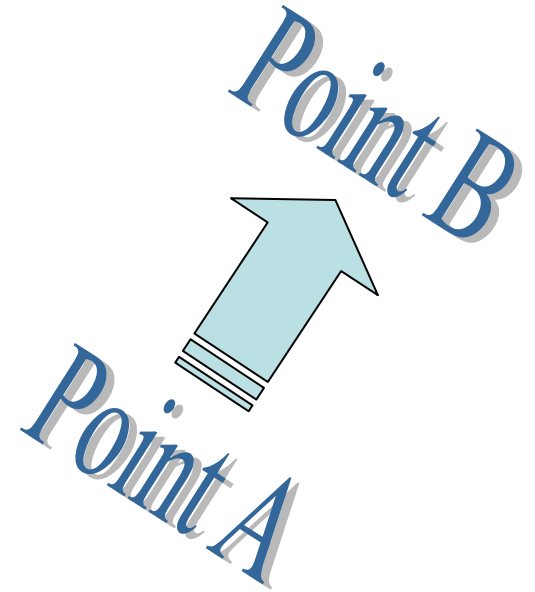


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# What is a Strategic Plan?

- A document .....well yes but ...
- A road map .....well, yes but
- A well grounded consensus ....
- Therefore ....
  - Define well grounded; define consensus....
  - Analytical and procedural dimensions





# Why Bother?

- Internal consensus around existential purposes and consequent goals (alignment).
- Unclear what constitutes normal business in period of rapid environmental change.
- Informed choices with respect to key issues.
- Positioning *vis-à-vis* stakeholders and funders.
- Benchmarks for success.



# Timing: When to Plan

- As part of routine cycle
- When facing key choices
- *After* periods of organizational change





# Timing: When NOT to Plan

- When in crisis
- Prior to changes in key appointments

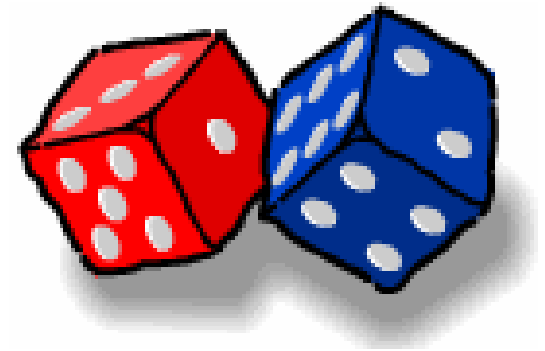
(Planning '*lite*' may be required as context for recovery or recruitment)





# Process: Why Process Matters

- Procedural consensus precedes substantive consensus
- Stakes high
- Reduces or renders manageable complexity





## So...What Process?

- Depends on culture of organizations
- Depends on size of organizations
- Depends on resources

But that said...



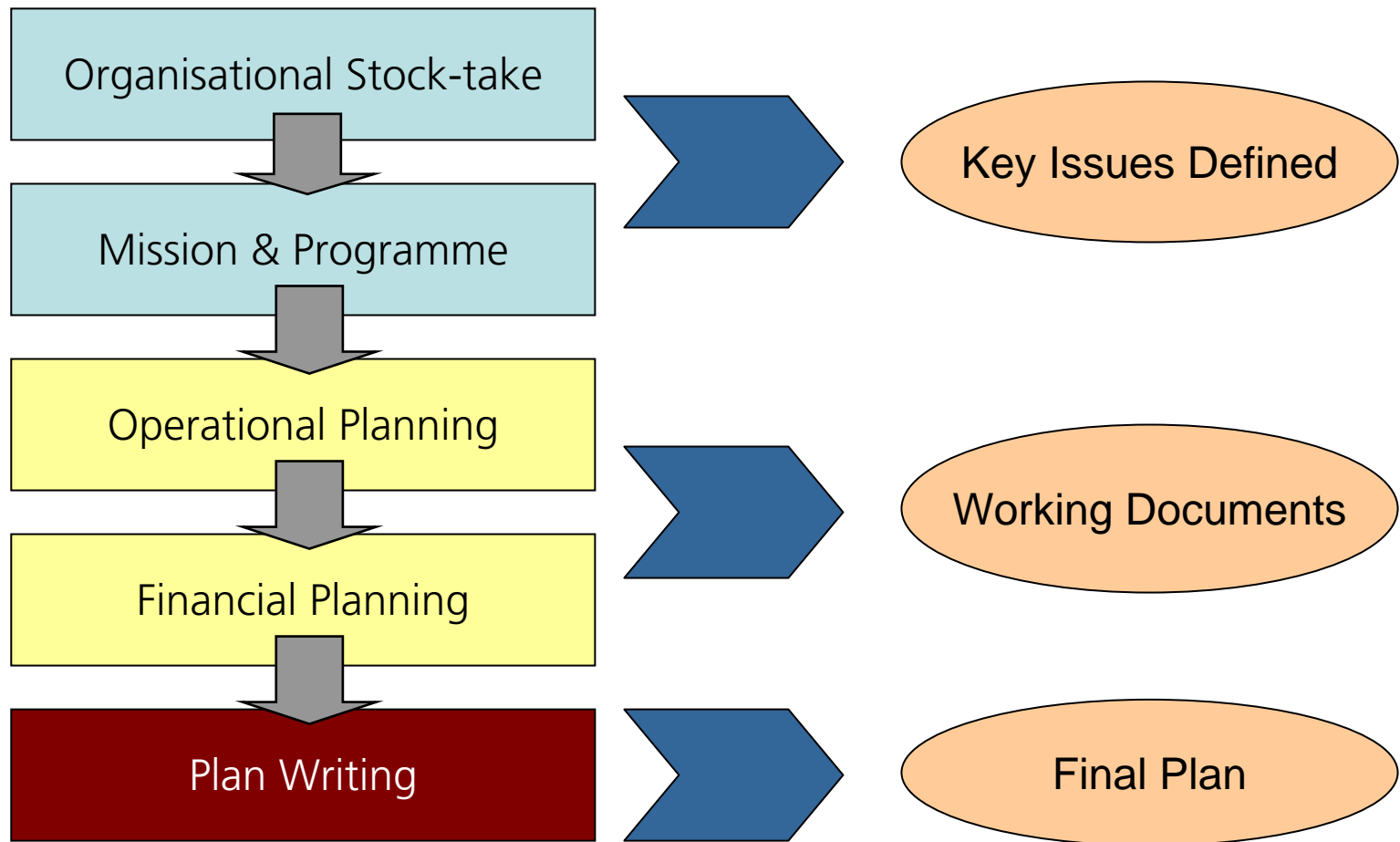
# Our Approach...

- Three stage process
- Balanced ownership
- Infrastructure: secretariat



## ACTIVITY

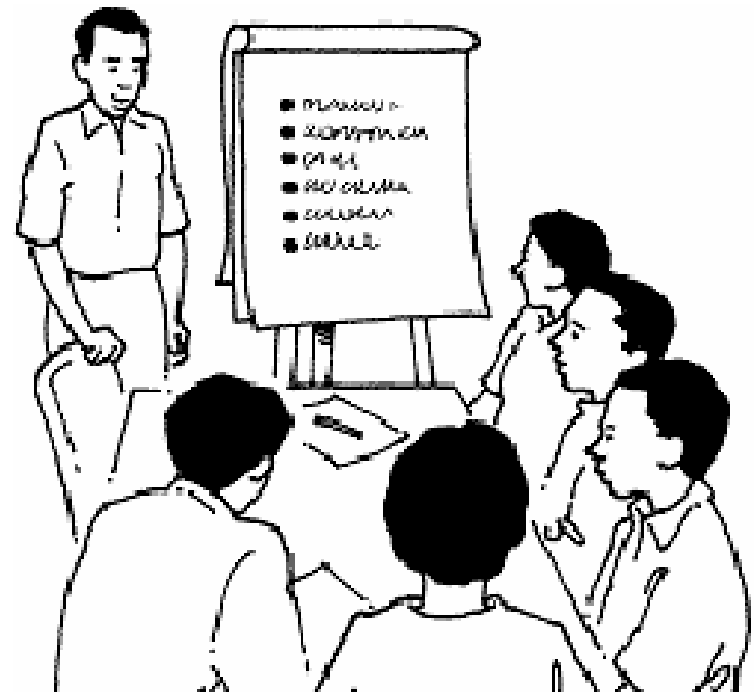
## OUTPUT





# Balanced ownership

- Senior Management Team
- Board
- Stakeholders
  - Staff
  - Funders
  - Audiences





# Secretariat

- Ensures perceived integrity of process
- Keeps faith with staff and board
- Acknowledges and addresses innate workload of planning





# Stage One

## Assembling the facts

- Environmental scan / competitor analysis
- History
- Analysis of mission and programme
- Stakeholder interviews
- Financial analysis
- Key issues (There are always 4 or 5)





# Stage One

## Interim outputs

- Consensus on key issues
- Identification of unresolved issues
- Common knowledge base



# Stage Two: Crunching Through It

*What are we trying to achieve...*

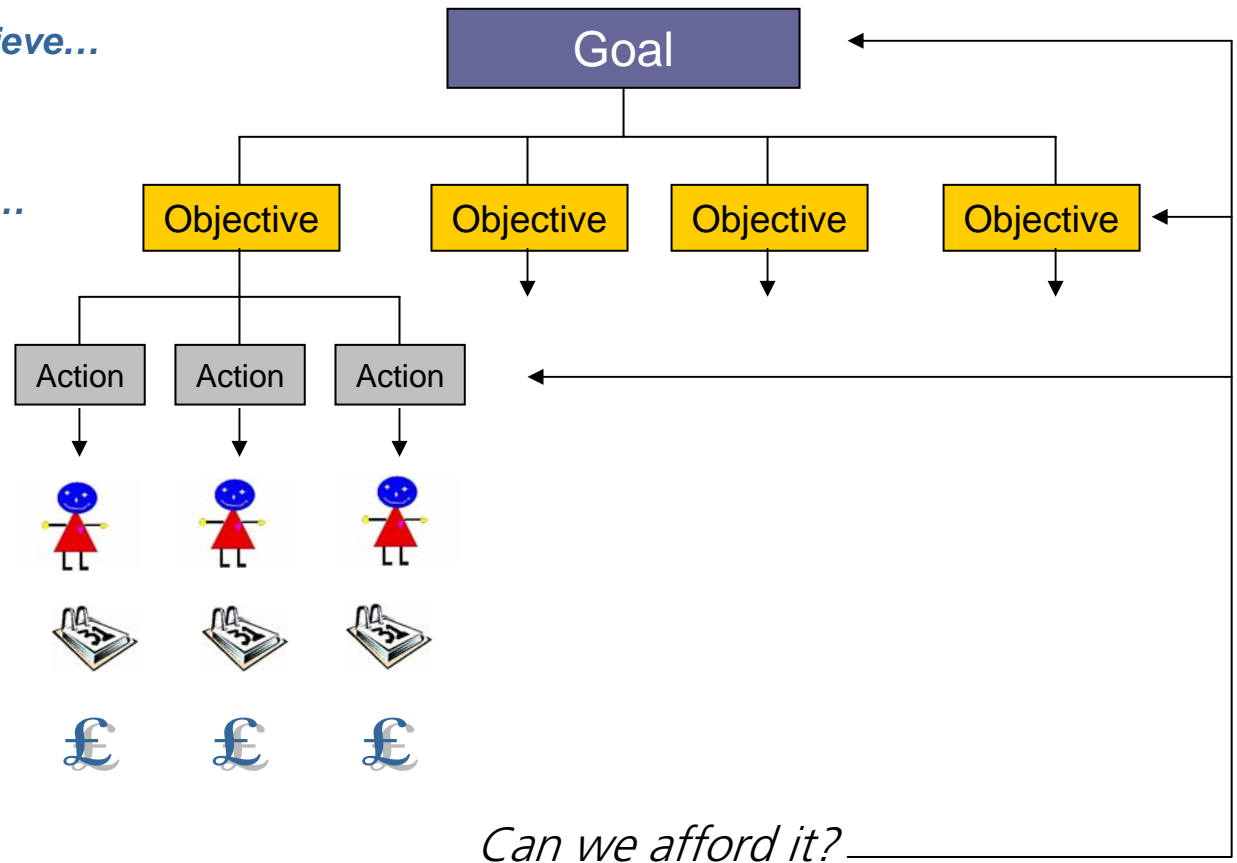
*What it means in practice...*

*How to go about it...*

*Who does it...*

*By when...*

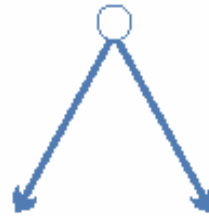
*And the price tag (net)?*



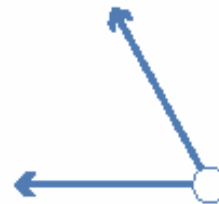
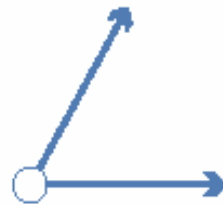


# The Elastic Triangle

**Mission and Program**



**Capacity**



**Capital**



# Stage Three: Assembling the Plan

- The plan itself
  - Summary
  - Environment
  - Mission and programmes
  - Organizational audit
  - Financial analysis
- Action grids
  - Milestones
  - Integrate into routine board business
  - Use with external stakeholders
  - ‘Cultural contract’





# What Goes Wrong and Why...

- Under-resourced process
- Planning fatigue
- Unwillingness to surface key issues
- Solipsism
- Planning and bidding conflated (too much spin, too early)
- Linear rather than iterative
- Analytical and consultative elements not balanced





# 8 Points to Think About

- Process and product
- Substance follows process
- Time to get stuck and unstuck
- Garbage in garbage out
- Implementation that individuates
- Closing the loop
- Monitor
- Less is more





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