



## Transforming the Strategic Plan into a Plan of Action

by Jon Weinstein

Bridging the gap between creation of an organizational strategy and the action steps involved in achieving the goals can feel daunting. This white paper breaks the process down, outlining the 10 steps involved and the critical factors to consider for a successful transformation.

So you've been asked to develop your organization's "strategic plan." I know what you're thinking: "No one needs a strategic plan." However, every organization needs a plan of action, some kind of guide to achieve the goals of the organization. Following the path outlined here will help you transform your strategic plan into an action plan, creating a direct line of sight between your mission, goals, and core projects.

Here's a quick exercise to try with your organization's managers or members of a strategic planning team. On one side of a piece of paper write down the highest priority projects in your organization. On the other side, write the mission of the organization. Now for the fun part...draw a solid line between the mission and the projects that DIRECTLY support it and a dotted line for those that INDIRECTLY support the mission. Then CIRCLE the projects that are not related to the organization's mission. What do you see? Are there too many or not enough solid lines? Are you wondering why you're doing the projects connected with dotted lines? And why in the world are you doing the circled projects?

This exercise reiterates the importance of not only devising the organizational strategy, but implementing the plan. Before an organizational initiative like a strategic plan is set forth, it must have not only the backing of the recognized leader of the organization, but active and visible sponsorship. A good leader will assemble the right team to accomplish the work. Developing a diverse team that represents key functional areas in the development of a strategic plan will pay significant dividends.

For each step we recommend facilitated sessions for the team to develop the key components of the plan. There are many benefits to this approach — primarily the efficiency and quality of the result attained by engaging a group in a concentrated, structured manner. Here are 10 steps to help you transform plan to action:

**ACTION 1:** Define the organization's current climate.

Define the organization's current environmental or operational context. The environment is described by major internal and external events and influences that will affect the organization during the period covered by the plan. These events can include landing or losing a big customer, rapid personnel changes, or even larger trends like the sagging economy.

**ACTION 2:** Consider risks.

To determine the risks ask the questions, "What events would prevent us from fulfilling our mission or achieving our goals? What will be the impact and what will we do to mitigate the impact?" The plan should include the top four or five most probable risks and corresponding mitigation activities.

**ACTION 3:** Create a mission.

The purpose of a strategic plan is to describe the direction of an organization by outlining corresponding mission, goals, and projects. The objective of this step is to create a mission for your department that takes the environment into account and supports the organization's overall mission. Your mission should simply provide your staff and those reading the plan a strong sense of why the organization exists and the direction it's heading. If you're struggling to create a mission that is distinct from the organization's, don't sweat it! Just adopt the overall mission as yours and be sure your goals are directly linked to that mission. If your group is creating the plan for the entire organization, use this step to review, refine, and refresh the mission.

**ACTION 4:** Develop goals.

With the mission documented, you're ready to create the four to seven goals the staff will pursue to achieve the mission. Goal setting is more art, than science. There is a



plethora of information on setting goals. Be disciplined and follow the SMART model. Make your goals Specific, Measurable, Agreed upon, Realistic, and Time-based.

**ACTION 5:** Define each project.

The enemy of implementing a good strategic plan is too many projects, delivering disparate results. The objectives of this step are to determine what projects are under way and describe how they support the goals and mission of the organization. Ask the team to list the core projects in the organization. Then, using simple worksheets, have the project leaders define each project, including the deliverables, resources, schedule, and, most importantly, what specific organizational goals the project supports. If the project doesn't support one or more goals, stop the project immediately.

**ACTION 6:** Determine the priority.

Now prioritize the projects, keeping the prioritization process simple. I typically use such highly technical categories as: "Must Do Under Any Circumstances," "Do If Resources Are Available," and "Wait Until Next Year." In the plan these categories become "Core Strategic Projects," "Other Critical Projects," and "Pending Projects," respectively. Prioritization requires the determination and authority to unequivocally place a project in one category. There should be no more than five projects in the "Must Do" column. The number of projects in the other categories is irrelevant as long as the leadership adheres to the principle that resources only allow a finite number of top priorities. If something is added to the "Must Do" list, something else must come off; strategic action planning is a zero sum game. Success requires bravery to kill the projects that don't support the strategy.

**ACTION 7:** Create time-lines and tasks.

Now that priorities have been defined and refined, it's time for scheduling specific tasks. When working on time-lines, be realistic in your estimations. By all means take notes, but even more important, take action.

**ACTION 8:** Communicate.

Communication is the most important key to successfully developing and implementing a strategic plan. Communicating about the strategy continues throughout the project, increasing during the implementation of the

plan. Promote the plan through focus groups, lunch discussions, information in internal emails and newsletters, and through informal conversations between leadership and the organization.

**ACTION 9:** Hold each other accountable.

People must be held accountable to the intended results of the plan. This is where the Measurable and Time-based parts of the SMART goals come in. Regularly ask and answer the following questions, with appropriate accountability based on the answers. Are people's actions consistent with the mission? Has there been measurable progress toward established goals? Are priority projects being executed per the plan? Have we stopped or adjusted projects that fall out of the "Must Do" category?

**ACTION 10:** Establish on-going review.

In conjunction with the Action Step 9, you must establish an ongoing review of the strategic plan and associated projects. Are the priorities we established in the plan still valid? Can EVERYONE in the organization talk about key elements of the plan? Can individuals express the mission, describe a strategic goal, or identify a core project?

The line of sight between the mission, goals, and core projects created by the plan of action will guide the organization and establish measures by which individual and team actions can be evaluated, measured, and rewarded. You've achieved the near impossible, creating a strategic action plan where one did not previously exist. The organization is excited and focused, and you get your reward. . . you get to do it all again next year.

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