

## What's in a name? – the **heart** of **strategic planning**

**'Strategic Planning'**: the term conjures up images of ivory tower corporate departments, strategic reviews by management consultants heralding yet more radical change, urgent demands for more and more information which are transformed without explanation into decisions and unachievable targets, intensive secretive processes that determine people's futures apart from them... great!

For some, Strategic Planning is late 20th Century fashion – now strategy 'emerges' in the learning organisation, whilst for others it is their rapid-response adaptability and 'trial and error' approach that enable them to seize the market opportunities and tactically outflank their competitors. It's time perhaps for a new name which leaves behind the stereotype of 'traditional' Strategic Planning, and reflects a more dynamic approach. So what term should we use?

- **'Strategic Management'** is one of the preferred 'new' terms – it gives an impression of an ongoing process of corporate responsibility, continual review and progressive change. But this in turn could also imply senior hierarchy perspectives: where's the engagement and ownership throughout the organisation, or the discovery and emergence of strategy by doing and listening – by anyone in the organisation?
- **'Strategic Leadership'** incorporates the dynamism of the 'L' buzz-word – but with the danger of responsibility residing even higher in the hierarchy pyramid than for 'strategic management'.
- **'Strategy Development'** does not encompass the importance of implementation – the specifics of who, what, how, and when (the where and the why having been decided by the strategy development process).
- **'Strategic Learning'** is too inward-looking, and fails to express adequately the need to take decisions and act, to bring about something new and better (for example, what's the practical impact on the organisation and its customers?).
- **'Strategic Development'** –well, this does reflect thinking, learning, growth plus practical implementation. *Strategic Development = developing strategy + making strategy happen + moving forward as an organisation*: perhaps this is a more accurate description including the key dynamic elements of effective strategic planning.

But whatever the name we choose, the fundamental issue is to understand the true nature of what we are talking about, and to gain a sense of how it fits within the activities and culture of an organisation. For strategic planning is – in essence – at the heart of an organisation. However practised, whether accepted or implicit, whatever activities it comprises, formal or informal, at the core of every organisation is making sense of what it's about, where it fits in its market, industry, community and society, what its purpose is and what it's aiming to achieve, and how. This is the case whether the organisation is commercial, non-profit, public, academic, healthcare, or social: it is a basic common need for people to try to understand where they fit in their organisation, what its purpose is, and how their contribution helps.

Strategic planning provides a framework in which this thinking and development can take place. It is the process by which the organisation attempts to answer these questions. Importantly, this may or may not be a conscious, formal, structured activity; it may or may not occur within a defined time frame; there may or may not be any written document; it may or may not answer all the questions at the same time. In spirit, strategic planning is a living activity: how this thinking occurs in an organisation, how directions are decided, how people come to understand what they can contribute, all are more part of the culture of the organisation than they are any documented formal procedure. Strategic planning is about hearts as well as minds – it is about the people in an organisation, their understanding, motivation, and contribution. It is really all about identifying opportunities, setting directions, aligning the organisation, and making it happen – through whatever processes are right for that organisation.

Being aware of this helps, of course – as does having a framework, however loosely defined. For some, a formal process within defined timescales resulting in specific outputs is the way in which they choose to focus attention and effort. But even this needs to be alive, dynamic, and meaningful: arguably strategic planning becomes discredited when it becomes routine, an annual strategic plan update cycle which ultimately often boils down to the targets and budgets for next year, rather than providing an opportunity for renewal and revitalisation.

And organisations can be at different stages in answering these questions. For some, it's the right time for a fundamental rethink of where they are and where they're heading. For others, there's an opportunity to find out what customers now need (or what they are likely to need), and be bold and innovate. Others may need to concentrate on how they realise their ambitions – what do they need to do, how can they use their resources to make the important things happen (as well as the urgent operational day to day issues). Also, the timing may vary: there's no predicting when significant steps and opportunities might present themselves or appear – and the adaptive organisation decides what to do now rather than wait for any formal process.

There are three dimensions to strategic planning: the **context** in which it takes place (the situation of the organisation in its wider environment, as well as its internal state and health); the **process** by which the thinking takes place and ideas are captured and expressed; and the **content**, the outputs – ideas, initiatives, documents, what is communicated. Awareness of all these dimensions is important – they each contribute to the journey of discovery and development of shared understanding undertaken by the people in the organisation.

For strategic planning is about people. It's the activity, the framework, the process by which they gain a common understanding of their organisation. It's about creating a shared language, shared pictures, impressions, and stories that enable them to make sense of what they are doing, and defining shared goals for where the organisation is heading. It's about what people can focus on and do to make a difference, how they can contribute:

***Strategic Planning is how the people in an organisation make sense of where it's going and how it's going to get there.***

Strategic planning – or whatever we might choose to call it – is about depth and meaning within an organisation. Although the context for each organisation, the process by which it is developed, and the style and detail of its content will vary, it is the way in which the organisation makes sense of its purpose, how it meets its customers' needs, how people work together to make this happen. It is about developing understanding – thinking and communication – and inspiring people to commit their knowledge, skills and energies towards a common goal. This - involving the minds and the hearts of the people in the organisation – is what ultimately makes strategic planning so powerful, alive and relevant.

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