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The Tens—Strategic Planning Mistakes & How to Avoid Them



1 Gathering the Wrong Data Too often organizations want to look deeply at their history in order to project forward. This is almost always a waste of time. The world changes too often to spend time on what the organization looked like 20 years ago. Spend time collecting data on the current strategic state of the organization, including market conditions and engagement models. Gather any applicable forecasts to inform strategic dialog about possible trends that will affect the social, economic or political context.

2 Writing a Vision Statement A vision statement is not actionable—it can reflect the consolidated aspirations of an organization, but it requires achievable projects and investments to make it real. These investments need to include accountabilities and responsibilities, as well as integration with near-term goals and objectives. Visions begin with immediate realignment to map to the goal. Vision areas can be completed over different periods of time.

3 Selecting the Wrong Team Too many leaders and visionaries, too many theoreticians, too many accountants. The strategic planning team needs to understand what “strategic” means, and to be able to analyze the current state, develop achievable future states and negotiate with various parts of the organization to evolve the organization. Carefully select a diverse, strategic, influential and operational team to ensure the plan becomes reality.

4 Not Using Scenarios Scenarios force organizations, and the people who serve them, to challenge assumptions. Without scenarios, biases can become embedded in the strategic plan rather than exposed by it. Scenarios articulate uncertainty and provide a context for identifying emergent opportunities, anticipating change, developing robust contingencies and practicing responses.

5 Committing to an “Expiration Date” The social, economic, political and technological assumptions built into a strategic plan change all of the time, as do the operational assumptions. Anytime a “strategic decision” is made, it should be made through the lens of the plan. If it supports the strategic direction, great, if not, the new strategic reality needs to be integrated into the plan and the associated outcomes included in a revised version. This helps make strategic thinking more important than planning, and strategy more a process than an event.

6 Not Aligning with the Budget The aspirations and vision for an organization must align with the ability to fund investments in capital, technology and people. If the strategic plan is separate from budget, then a misalignment is highly likely. Organizations must tie strategy to budget, because as, stated in “Writing a Vision Statement,” the future starts immediately in most cases, and therefore, those early tasks require budget in order to transform plans into actions.

7 Leading and Participating Those charged with strategy should not be distracted by the details related to facilitating the strategic planning. Too often, very capable managers with strong strategic perspectives lose themselves in the tactics of strategic plan development, ultimately doing disservice to the organization by prioritizing short-term cost over long-term insight. Hire a facilitator who can drive the process, while the stakeholders focus on developing meaningful strategies.

8 Not Including a Wide Range of Staff and Stakeholders Strategic planning should be very inclusive of staff and stakeholders to ensure that suggested directions are achievable, and if they aren’t currently, what resources and investments would be necessary to make them feasible in the future. Strategy requires that those responsible for operations be as intimately involved as leadership, because ultimately they need to implement the plan at the day-to-day level.

9 Not Understanding “Strategic” The idea of strategy is to focus an organization on long-term goals, which usually involves mitigating risk to threats, and leveraging opportunities—as opposed to tactics, which focus on navigating near-term obstacles in order to remain operationally viable. Strategy seeks to create a future context for an organization, and the strategic plan acts as a map of activities and investments necessary to reach the future state.

10 Planning without a Plan for Execution A good plan is only good if it drives execution. Plans aren’t contexts, and they aren’t background information—they are pre-stories for action that should be designed to spur and guide progress. If the plan is developed for planning sake, and the vision just to voice an aspiration, then the plan will fail. Plans can be big and bold, but without the reality check of ability to deliver, alignment with budget and willingness to change, they are just thoughts in a PDF file destined to be reviewed at the next appointed time.