

## Beating the barriers to Strategic Planning

### How to gain lasting clarity within your management team

Winston Churchill once said “If you don’t stand and fight when you have a chance to win, one day, you may be asked to go and fight when you have no chance to win”.

Churchill’s statement emphasizes the advantages inherent in strategic thinking and planning processes. It also stands as a sentinel warning against the risks of neglecting, not understanding, or not properly executing strategy.

Let’s look first at how to recognize and then overcome the barriers to strategy development.

### Overview

Strategic planning is a learned expertise.

The term *strategy* derives from the Greek word *stratēgos* ("stratos" meaning army, and "ago" meaning leading/guiding/moving toward), which during the age of Athenian Democracy referred to a 'military commander'.

Despite the term’s origins, strategic planning is not inherent in all managers and leaders.

Strategy development is often based on planning and analytical systems. Many companies begin strategy sessions using SWOT, the Strength, Weakness, Opportunity and Threat model. However, strategic thinking is equally important, even before turning to strategic planning models.

Putting effective strategic thinking into play early is a prerequisite in the strategic planning process and is central to creating a positive result and mastering the challenge of initial strategy development.

In his book *Successful Entrepreneurial Management*, John Butler, strategy author and consultant, distinguishes between strategic thinking and strategic planning.

Butler describes strategic thinking as “a meeting of minds where collective creativity reveals novel, innovative strategies to create sustainable business advantage; and to create possibilities for success significantly different from those of the present. It is a divergent, creative, synergistic team effort”.<sup>1</sup>

Strategic planning on the other hand “takes into consideration the actionable elements of the operation, incorporating the potential and possibilities developed through strategic thinking. It is a much more analytical, conventional and formal process”.<sup>2</sup>

### Barriers

Barriers are those manageable influences that can typically derail best intentions in group or committee strategic process development. Executive groups face four main barriers: Fear, Cynicism, Ignorance and finally, a combination of Time and Place.

Before assembling a group, isolate each barrier and assess the likelihood of it negatively affecting the outcome. Each barrier, when contained, creates an improved result for sustainable and effective strategic direction. Expect exponentially improved results when all four are addressed and removed.

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<sup>1</sup> John Butler from his book *Successful Entrepreneurial Management* ©2000

<sup>2</sup> John Butler from his book *Successful Entrepreneurial Management* ©2000

The easiest barrier to overcome is Time and Place.

## **Time and Place**

Begin off site.

It is difficult if not impossible to do our best thinking amid the demands of the workplace. Strategic thinking and planning is most appropriately formulated away from the workplace where it will be tactically implemented and executed.

Many attempted strategic sessions held in the company boardroom are doomed to failure by venue alone. A boardroom venue often leads to ineffective, inefficient use of leadership time.

This inefficiency not only wastes valuable resources on the day of the initial process, but also becomes increasingly problematic later, when the management team tries to push a flawed strategy out to the outer margins of the company.

Heading to the boardroom often becomes a panacea for not getting it right the first time. Holding continuous meetings and interventions starts to just feel right. In fact, many executive teams who find themselves constantly going back to the strategic development process report that they are using a workplace venue.

To avoid this, pull your committee together at an off site, quiet venue without phone calls from landlines or cells, emails, blackberries or other intrusions. Choose an alternate environment that frees one's mindset and encourages creativity. Investing in a retreat-type environment for a session that is properly facilitated can bear fruit for a substantial period of time, even years in some cases.

## **Fear**

Everyone feels it. Everyone considers it. Some let fear control their participation. Others do as Dr. Susan Jeffers writes in her seminal book *Feel the Fear and Do It Anyway*: acknowledge it and smash through it.

The barrier of fear underlies even the most successful and memorable strategic thinking and planning sessions. The ideas that have shaped many companies' futures have often been incubated in self doubt and fear, but released by a strong visionary through effective strategy development.

The human psyche is naturally able to see more clearly what can go wrong than what can go right. However, a high performer's key attribute is the capacity to have a detailed mental picture of success in all pursuits, including strategy development processes.

Every day, managers and leaders succumb to fear. Some of the best material gets left on the grey matter drawing board because someone was afraid to speak. Fear in the workplace has many sources and manifestations: anxiety about job security, fear of ridicule, feelings of inadequacy, resistance to change. All of these factors may be real or imagined and can be generally called fear of the unknown. The responsibility of eliminating the barrier of fear rests on one set of shoulders alone.

Fear is always eradicated or exacerbated by one person: the company's highest ranking officer involved in the strategic thinking and planning process. The senior leader must set a clear tone and facilitate effective communication by allowing all participants to be heard and by insisting on substantial contribution by all. An important component to his role is to keep other stakeholders' evaluations of the ideas and perspectives being introduced to a minimum because they may be intentionally or unintentionally demeaning for others.

The group as a whole must be in the same place at the same time and must not try to get to the end without experiencing the strategic thinking and planning journey itself. A good model without fear enables the team to carry peer discussion and group evaluation, both necessary functions, over to a later properly facilitated stage of the process.

## **Cynicism**

The dictionary defines *cynicism* as: *An attitude of scornful or jaded negativity; especially a general distrust of the integrity or professed motives of others.*

The *cynic* him or herself: *A person whose outlook is scornfully and often habitually negative.*

Consider both of these definitions and be mindful of who gets invited to strategic thinking and planning sessions in the first place. The cynic stakeholder can be a drag on much needed creativity if a “been there, done that, bought the t-shirt and it didn’t work” attitude prevails.

While keeping an eye on the invitation list, also keep a charitable view on the origins cynicism. The original “cynics” were a sect of Greek philosophers who believed that virtue is the only good, that the essence of virtue is self-control, and that surrender to any external influence is beneath human dignity. The modern cynic often prizes the same qualities of self control and feels it is necessary to bring it to bear on the strategic development process.

Being the “voice of reason” is a badge of honour for many senior managers. Those with a touch of the cynic can always recall occasions where they led the team through sober second thought and turned out to be right.

Remember: it is human nature is to be able to see more clearly what can go wrong than what can go right. This is most true for the cynic.

To be clear, the cynic sees him or herself as cautious. Caution is an asset in strategy discussions, but like any great behavioural strength, if overused it becomes our biggest weakness.

The highest ranking senior manager should acknowledge the barrier of cynicism at the very beginning, perhaps meet individually with some stakeholders in the days leading up to the event to gauge its impact, and then early in the first day of the process, speak to the group about the importance of unbridled discussion.

Cynicism is a protective reflex in many, so it is perhaps the hardest barrier to surmount in the strategic thinking and planning process. But like the other three, understanding and early acknowledgement of it are key to taking action and getting the most out of a group.

## **Ignorance**

Many companies and executive teams that have harnessed the power of great strategic thinking and planning have learned to become adept at overcoming ignorance. They report that, looking back, their biggest shame in not moving forward more quickly was in not being able to recognize the barrier of ignorance before it had eaten away at corporate resources, gross margin and EBITA. Ignorance in this case can be simply characterized as not knowing what we don’t know, but should.

Ignorance often manifests in feelings of corporate inertia. “We have a problem with direction and I can’t put my finger on it”. It can be found in situations like turnover in junior positions. “We are losing good people and our exit interviews are telling us that our former employees didn’t see any future with us”. This barrier often amounts to a lack of a universal, teachable point of view. If those who are tasked with strategic thinking and direction cannot perpetuate a shared point of view, they are thus not able to be push it out to the greater organization.

Ignorance, as a barrier for executive teams, means not recognizing the symptoms above as situations crying out for a strategy development process. Lacking proper context and a proper level of depth in a conversation at a strategic level context can sweep problems back under the rug again, where they fester further.

To gain control and to ensure core leadership competency, think through cause and effect scenarios. The effect is the outcome (i.e. costly staffing and personnel issues), which is bad. Worse still is to not address the cause(s) (i.e. shared vision breakdowns). Tracking a leadership breakdown back to its root cause pays big dividends in profit.

Ignorance can never be eliminated. Some business issues will always lie outside of our understanding. To think we have it all covered brings us full circle back to ignorance.

Building a root-cause questioning check into the strategic development process can lower the barrier of ignorance. As with the other three barriers, awareness amongst the executive team is key.

## Conclusion

Strategic thinking and planning can be like open source software development .... think Linux. Its greatest asset is the flow of ideas on the front end and the hitchhiked idea creation format. The contribution of one can be the tail end of an earlier idea that was initiated by another person.

Properly addressing the four barriers results in an equal number of enhanced organizational effectiveness indicators:

1. A vision for the future.
2. An understanding of measurable result.
3. Actionable objectives.
4. Core teachable point of view.

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