



Strategic Planning 101

It's that time again! I don't know about your company, but my company has been going through the Strategic Planning process and so has ISA. This year, as VP of Industries & Sciences, I was able to both observe and participate in that process. And I have to tell you that I am impressed with the way that our Society is strategically planning for the future of ISA.

But I was even more impressed that an external consultant, Steven Worth, of Plexus Consulting Group, Inc., was brought in to discuss strategic planning with us at the Council of Society Delegates Meeting on Sunday. This expert confirmed for us all that ISA is doing the right things and is on track in developing a strategic plan for our Society. But more importantly, he confirmed that there is much work to be done to position ISA for the future.

To be honest I expected the consultant to review SWOT (strengths, weaknesses, opportunities, and threats), since most companies use this analysis as the basis for the strategic planning process. But this presentation was different. While it was framed around organizations like ISA, the details presented apply to every organization.

In case you missed the meeting, here are some of the key points that were discussed, which can be applied to your own company's strategic planning effort:

- * **Roles & Responsibilities** – Before you ever start the strategic planning process, roles and responsibilities of executive leadership and staff should be clearly defined. While the groups must work as a team, typically executive leadership is responsible for strategic direction, sponsorship, and fiscal oversight. Staff is responsible for tactical implementation, new ideas & initiatives, and quality control.
- * **Strategic Implementation** – Strategic implementation is an iterative process – a cycle of exchanges between executive leadership and staff. While executive leadership governs the process, there must be complete transparency, staff members must be engaged, and the company must be agile and responsive to changing market conditions.
- * **Most Common Problems & Remedies** --- Executive leadership and staff members can be deficient in some areas: lacking direction, lacking results, wasting time,

lacking follow through and support. Here are some specific ways to address these problems:

- **Be prepared**— Make sure that the entire organization knows your strategic plan. Know what resources you already have available to accomplish your goals, but also identify exactly what you need. Make sure that you find a match – of the right resources to requirements – so that the plan is achievable.
- **Set goals** – Make sure that your staff has an executable plan so that strategic goals can be achieved. Specific executable tasks must be identified.
- **Be Agile** – Expect the unexpected. As your market changes, be prepared to adapt and change.
- **Partner** – Create an atmosphere of partnering (with executive leadership, staff, external entities, etc.) that is strategically focused but that has measurable, tactical objectives
- **Stay focused** -- Keep things in perspective.

The speaker then reviewed a successful strategic planning process (see below). These steps should cause us to ask and answer strategic questions.

1. **SWOT** – What are your company’s strengths, weaknesses, opportunities & threats?
2. **Visioning** – What will the company look like in the future?
3. **Mission Statement** – What is the company’s mission? Does it change as a result of the SWOT analysis or a new company vision for the future?
4. **Principles** – What principles govern the company? Do they hold true in the future or must they be changed, too?
5. **Goals** – What are your company’s high level long term and short term goals?
6. **Strategic Objectives** – What strategic objectives must be met to achieve these goals?
7. **Tactics** – What specific tactics must be executed to achieve strategic objectives? What are expected results? How will these be measured?

Steven ended his presentation by identifying 3 areas of focus: **relevancy, insightfulness, efficiency and effectiveness**. Related questions are:

- * **Relevancy** – Are you responding to market needs?
- * **Insightfulness** – Are you prepared for the future? As market needs change in 5, 10, 15, or 20 years, will your company be positioned for success?
- * **Efficiency/Effectiveness** – Are you operating efficiently? Do you have a clearly recognizable brand? Do you have a memorable and meaningful purpose for both your company and your customers?

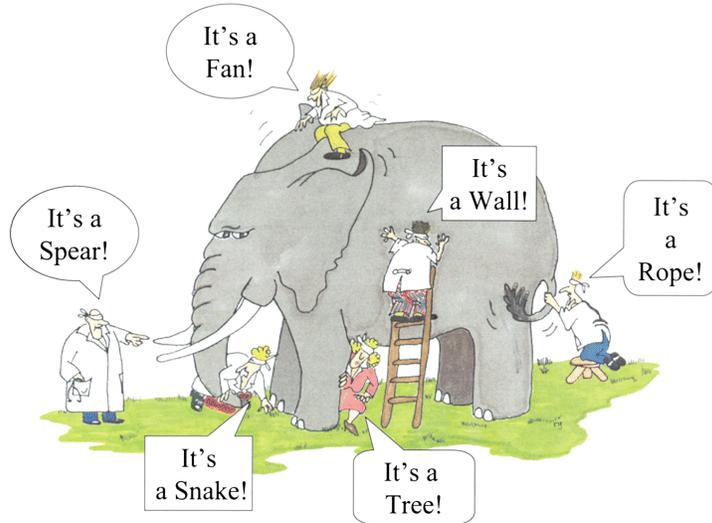
The last question in this series is one of crucial importance to the future of ISA:

Is our governance/structure driven by our mission or is our mission driven by our governance/structure?

Steven reminded us of the story of the blind men and the elephant.

Here is my favorite rendition of the story (taken from the web).

What does ISA look like to you today? What should it look like in the future...not just to you and me but to our membership and the automation industry around the globe?



You might ask the same questions about your own company? What does your company look like now? What should it look like in the future...not just to you and your organization, but to your customers, competitors, etc.?

If you attended this meeting, I hope that you walked away understanding just how important the strategic planning process is to the success of ISA and to your own company/organization. ISA has already invested a significant amount of effort (and will continue to invest in this on-going process) to position our Society for success now and in the future.

Each year I leave ISA's Leaders' Meetings feeling more empowered than ever to return to my company armed with knowledge that can be useful and impactful—knowledge that will make a difference. How about you?

Are you the only one who sees the elephant in the room? As you plan your own personal strategy for the future, I challenge you to commit to becoming more engaged in leadership within your company and in ISA – not just for today, but for our future!

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