



Three Approaches to Strategic Planning

There are many, many approaches to the strategic planning process. I, thanks to many years of experience, prefer to take the approach most likely to lead to real action and consistent results. Given this bias for action that flows directly out of strategy, I believe there are three essential approaches to strategic planning:

Approach # 1 – Vision-based Planning

In this approach, the process aims first at creating a clear and concrete vision for the future of the organization, how it will address the needs of the community, and the key issues faced. Based upon these judgments, only the essential information needed to make decisions about long- and short-term goals, objectives and action priorities, is used in the process. Typically this is the quickest and least expensive of the approaches because decisions about action priorities can be made rapidly, based upon a highly focused assessment opportunities and challenges. If leaders are well grounded in the facts of the situation, Approach #1 can be a very effective way to proceed.

Approach # 2 – Data-based Planning

In this approach, a planning committee is immersed in data and information about historical performance, current situation, and future projections. The process then moves to identifying key planning issues, creating a vision, then setting goals, objectives, and action priorities. This is the most expensive and time-consuming option. Essentially, Approach #2 is the “traditional approach” to strategic planning. Surprisingly, this approach often ends up with very tactical plans that do not create a compelling vision for the future nor strong action to achieve it. However, when a leadership group is not well informed and/or is very diverse, this may be the only viable option. With care it can lead to positive outcomes.

Approach # 3 – Issue-oriented Planning

This third approach is a hybrid of the first two. In this approach, the planning committee reviews high-level information about the history, current situation, and future projections. This review is generally accomplished in one meeting. Based upon this high-level review, the committee moves through the process identified in Approach #1. Approach #3 can also be very cost effective. It is useful when a group is well informed but not on the same page with the facts of the situation. It also strikes a good balance between the logic of data-based planning and the logic of vision-based planning.

These are general models for strategic planning. For the most part, Approach #1 or #3 will lead to the good outcome in a very efficient manner. However, because we recognize that every situation is unique, I work to custom design an approach that is a good fit with the client's situation and one that will lead to a positive outcome.

