FOUNDATIONS OF LEADERSHIP
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Lesson 9
STRATEGIC PLANNING

Strategic Planning is a big subject. We cannot teach it only in one lesson. Therefore, I want to share with you the Nine Steps for Bringing a Project to Successful Completion.

All of these nine steps are essential and it’s important to do them in the order I teach them.

Planning is essential for a project to have success. Many businesses, organizations and schools do not plan, therefore they have low quality or they fail.

Planning takes time. Planning takes time to think and time to study others who have been successful.

NINE STEPS TO SUCCESSFUL PROJECT COMPLETION

1. Vision
   As we have studied in a previous lesson, everything starts with vision. If you have no vision it will be useless to plan. How can you plan if you don’t know where you’re going? Everything you do in our business, school or organization must be associated with your vision:
   - Staff
   - Budgets
   - All activities
   - What you do with your time
   - Training

   Everything must be done in accordance to your vision!

Vision is what you see for the future of our organization, school or business. Everything you do must be in accordance to your vision!
Goals are landmarks for your future. They must be associated with your vision!

Goals answer the question: “How do we know if we are accomplishing our vision?”

Strategy answers the question: “How will we do it?”

2. Goals
Goals are landmarks for what you hope to do in the future. Vision is what you see. Goals are what you want to do associated with that vision.

- Each department in your organization should have annual goals.
- Goals answer the question: “How do we know if we are accomplishing our vision?”

**SMART GOALS:**
- Specific: (What exactly?)
- Measurable: (How many?)
- Attainable: (Can we really do it?)
- Relevant: (Does it relate to our vision?)
- Time-Oriented: (When will they be accomplished?)

The goals become the compass for your work and the work of each department of your organization for the year, month, week and day.

- Goals should be evaluated regularly
- Goals should be discussed among staff
- Goals are what guide your everyday work

3. Strategy
- Vision answers the question: “What do we see?”
- Goals answer the question: “How do we know if we are accomplishing our vision?”
- Strategy answers the question: “How will we do it?”

Strategy is “how” we will do it?

- How will we sell our product?
- How will we help the people?
- How will we educate the students?
- How will we get the money?
The next step is how many staff do you need and what will be their job and salary?

Many businesses, schools and organizations do not insure that training is provided to their staff. This is a mistake.

The Senior Leader or Director creates the vision and he creates some of the goals and strategies, but he works with a team of managers and other leaders to create the goals and strategies clearly. They meet in teams, discuss and plan and report back to the Senior Leader or the Board of Directors.

4. Staffing
The next step is staff. How many staff do you need to start and how many do you need to add during the new year?

What kind of staff do you need?
- What will be their job description? What do you want them to do?
- What skills and experience do they need?
- Men or women?
- The staff will need Job Descriptions and occasional evaluates.
- What will their salary be?

5. Budget
Many organizations create their budget before they create their goals, strategy and staffing plans. This is not correct! How can you create a budget if you don’t know your goals?

- You create your Budget Expense based upon your Income. If your expense is more than your income you adjust your budget
- Each department creates a budget and submits it to the Finance Department and/or the Senior Leader or the Board of Directors

6. Training
One of the keys of Senior Leaders and Managers is to insure that their staff is trained. This could include training they have received previous to
Be Proactive in insuring that new staff and old staff receive initial and ongoing training.

working with you, on-the-job training, training within the organization (classes, seminars, workshops) and sending them to training to upgrade their skills.

Many businesses, schools and organizations do not insist that training is provided to their staff. This is a mistake. Methods change; technology changes; skills become “rusty”. Therefore, creating a Leadership Development Culture is an important step in the success of your business, school or organization.

- Organizational Orientation
- Job Orientation
- On-going Skills Upgrade
- Special Training for new technology or skills needed

Be Proactive in insuring that new staff and old staff receive initial and ongoing training.

7. **Overseeing**

“Overseeing” means that someone must inspect the work of the workers under them. I’ve seen many times when workers are left to do their job with no oversight as to their quality, efficiency and effectiveness.

(Please study my lesson on “Leadership Styles”)

- Quality
- Efficiency
- Effectiveness

All jobs should have Job Descriptions, goals and expectations.

- Are they producing the results expected?
- Are they using resources efficiently?
- How are the team relationships?

All of this involves not just a Job Review, but someone checking up on their work from time to time.
8. Evaluation
Evaluation is the next step after overseeing. You watch, you review, then you evaluate. How are they doing according to the standards or expectations?

9. Adjustment
The final step after all of this is adjustment. After overseeing and evaluation:
- Do you need to adjust the vision?
- Do you need to adjust the goals?
- Do you need to adjust the strategy?
- Do you need to adjust the staff (move or add staff)?
- Do you need to adjust the budget?
- Do you need to adjust the training?

Conclusion
This is a process with nine components. Each component is essential in the order it is set.

This is an overview of Strategic Planning, but many more details need to be added.

Questions:
1. What has been your work experience with Strategic Planning at the places where you’ve worked? Have they did Strategic Planning? Please explain.
2. Have you ever set goals for your work? Please explain how you did that and the results?
3. Do you feel you have had enough training to do the jobs you’ve done before?
4. How do you feel about someone overseeing your work to make sure you are doing good quality work, and being efficient and effective?