

If Your Strategic Plan Is Failing, You Might Want to Look in the Mirror



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If there is anything I've learned from working with nonprofits to small business development centers to government agencies, it's that strategic plans get shelved just as often as they are created. While much of my guidance about overcoming obstacles to the strategic planning process is tailored for nonprofits, strategic planning is critical for any type of business. If you're a leader in any sector, these recommendations and advice can apply to your strategies.

If you're a leader and your strategic plan isn't working, then it may be time to take a look in the mirror. There's a very good chance that the problem is the lack of attention you're

putting on the plan and its execution.

I know you're busy. Maybe you're writing a grant that's due tomorrow, replacing your development director that suddenly left, serving the board's latest urgent request, preparing a financial report for tonight's board meeting and so on. I get it.

But if all you're doing is putting out fires, then you're not making time for the fire prevention process of strategic planning – and, in the process, you're losing numerous opportunities to build your organization's capacity.

I've been leading strategic planning work with nonprofits for about 25 years. I know what works and what doesn't, and the number one thing that keeps strategic plans from working is the inadequate attention that leaders put on using their strategic plans.

Sure, Covid-19 may have kicked your plan's butt and implementing it may have been folly. But now that we're beginning to move to the other side of the pandemic, it's time to update your plan and make sure that your leaders are ready to oversee its execution.

If you've got a strategic plan that needs to get kickstarted or updated, here are some foundational ways that you and your team can make sure that it has the impact that you want.

Related: 5 Actionable Strategic-Planning Tips To Boost Business Efficiency

Approach strategic planning as a process, not an event

All too often, leaders view strategic planning as an event or a moment in time. You hear this perspective when they talk about creating a plan or conducting an off-site planning

retreat, but they don't discuss how the plan is going to get done.

An alternative and much more supportive mindset is to view strategic planning as an ongoing and never-ending process. Assess, plan, execute and repeat, year after year. All the while, you're making sure that you're championing the overall process on behalf of your team and organization.

Approaching strategic planning as a process also sets a great precedent for all of the other replicable processes that should be at the core of your organization: fund development, performance management, board member onboarding, volunteer training, etc.

Get a co-champion

The organizations that have the most success with strategic planning typically have two people that oversee the plan's implementation. I call these people planning "co-champions."

Having a co-champion provides you with accountability, a thought-partner, and, frankly, just makes strategic planning more enjoyable. Plus, the organization builds a deeper talent bench by having two people, not one, that are leading the strategic planning charge.

If you don't have a strategic planning co-champion structure, I strongly encourage you to do so.

Related: [How to Fall in Love With Strategic Planning](#)

Create and communicate a planning calendar

If you're like me, if something's not on your calendar, it just ain't gonna happen. So, get your strategic planning meetings on the calendar – for a full year.

The meetings that I've found that work best are:

- An annual meeting or retreat for the board and staff to review and update your plan's long-term vision and key strategic themes
- Quarterly check-in meetings of your team's key leaders to ensure that the plan is on track and to celebrate success
- Have key team members meet monthly to review and discuss progress on goals

All of these meetings can be planned in advance. Once your team members see these meetings and dates on the calendar, then they'll develop faith in the process and will jump on board with you.

Related: [How to Kick Off Any Strategic Initiative With Success](#)

Measure, measure, measure

You've probably heard the phrase, "What gets measured, gets done," or, "You manage what you measure." There's a ton of truth in those statements.

I've found that developing a monthly measurement cadence is a good fit for most organizations. Measure your active goals and metrics monthly and make sure that your team knows where things stand.

If you need some ideas on how to best measure the goals and metrics on your plan, then consider this two-part approach. First, use a "traffic light" rubric to apply a color status to each of your goals:

- Green: The goal is on track and will likely be completed by the due date
- Yellow: There are slow-downs with this goal and it may not be completed by the due date
- Red: You've got to be kidding! There's no way this goal

will be completed by the due date

I also apply two more colors to round out the rubric:

- Blue: The goal has been completed
- Grey: Work on the goal hasn't been started

Second, you can make your measurement even more accurate by applying a percent complete score. For example, you may have a goal that is "red" but it's 90% of the way complete. The percent complete score paints a more complete picture.

In conclusion, effective strategic planning – like so many things – requires strong leadership and management. As a leader, it's up to you to make sure that you and your team have the right mindset and practices to ensure that you get the best return on your planning investment.

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