

A Short Definition of "Strategic Planning"²

A while back I wrote [How To Develop a Business-Aligned Social Media & Social Networking Strategy](#) which described a structured approach to strategic planning. That turned into a 2,200-word [white paper](#) and described a process for those situations where structured development process is called for. This is how I described it:

Some organizations develop strategies for adopting social media and social networking based on an informal process that proceeds spontaneously and with minimal central coordination. Others prefer a more formalized process, especially in situations where management recognizes the potential for impacting so many different corporate functions. This paper is intended for the latter group.

I recently had an opportunity to write a brief description of strategic planning. Here it is:

A strategic planning process delivers a set of defined initiatives (projects) that achieve a desired set of business goals. The planning process involves a definition of these business goals, an assessment of the resources available for meeting these goals, and the definition of specific plans (initiatives) that are designed to achieve the goals. The process usually incorporates a ranking exercise that identifies the highest priority initiatives.

It's Not MY Strategy It's YOUR Strategy³

I was talking the other day with a friend about what consultants do. One of the topics raised was “strategic planning.” We talked about [what that meant](#) for a while. Then he said, “Oh, so you create business strategies for clients?”

Word parser that I am, I had to disagree with that. I don’t “create” strategies for clients. I like to think that what I really do is help them figure out what practical steps make the most sense for helping them accomplish their short and long term business objectives.

In a nutshell, a “strategy” project involves holding up an objective and analytical mirror to the client that helps them understand:

1. This is what you say your organization’s goals are.
2. This is how you are currently managing technology and related resources.

2. Originally published June 19, 2007

3. Originally published May 27, 20

3. Here are specific short term and long term initiatives you can undertake to improve the alignment of (1) and (2).

One of the problems that sometimes occurs with “strategy” projects is that an explicit connection isn’t made between (1) and (3). That’s why I believe that any recommended initiative that emerge from a strategy consulting project should always include not only an explicit statement of how it supports a strategic business objective but also an explicit statement of the resources required to carry out that initiative.

One reality of strategic planning projects is, as pointed out in [How To Develop a Business-Aligned Social Media & Social Networking Strategy](#), that the total costs of the initiatives that emerge from a strategic planning exercise often outweigh available budgets. That’s one of the reasons that strategic planning shouldn’t be a one-time activity performed by senior management. Instead, it should involve an ongoing process for continued evaluation and review of current and planned initiatives.

Tough choices may have to be made. Management always needs to be asking how each initiatives contributes to the organization’s objective. If this means that a mid-course correction is needed in the “strategic plan,” so be it.

How To Avoid Common Strategic Planning Mistakes⁴

For the past few months one of the most popular posts on [my blog](#) has been [A Short Definition of “Strategic Planning.”](#)

I’m not sure why. Maybe it’s because the term “short definition” is in the title. Why read a “long definition” if a “short definition” is available?

Maybe it’s because Spring is the time of the year when thoughts turn to strategic planning. (I have noticed that the post usually shows up on the first page of a [Google search](#) for the term definition of strategic planning, so that probably explains a lot of the popularity.)

While I am a firm believer in the value of strategic planning, I also think there are some common mistakes that people make in connection with it. I discuss some of these below.

Who owns the process?

One mistake has to do with how a strategic planning project is conducted. [As noted elsewhere](#), management shouldn’t assign staff or hire a consultant to “go away and create a plan” if management isn’t going to be involved.

4. Originally published June 17, 2008

A strategic planning process should involve both executive management as well as the people who will be putting the strategic planning into effect. Without that type of involvement and the “buy in” it helps generate, a strategic planning process has a real danger of ending up as a bound three ring binder gathering dust on someone’s shelf. I’ve seen that happen before and it’s a waste of time and money. People need to be involved.

Don’t stop before implementation.

Another mistake is not to make the transition from plan into action. It’s one thing to identify strategic business goals and target metrics such as revenue or customer growth, sales, or some other strategically defined numeric target. It’s another thing to actually roll up your sleeves and figure out what needs to be done to make things happen – and then to do them.

If you don’t include an “action step” in the process where you prioritize and talk realistically about moving or allocating schedule and resource requirements, nothing is going to happen. You need to move from goals and objectives, to concrete plans, to actual implementation of initiatives that involve real change.

Don’t let the process become an excuse for temporary inaction.

One problem I’ve seen arise is that departments or functions that are not directly involved with the planning put their own decision making “on hold” while the plan is “under development.” You might hear someone say, “Oh, we can’t do anything about that until the strategic plan is finished.”

A related problem is that other departments or functions can’t put their own planning on hold. “We can’t wait to do X till the plan comes out – we’re already in our budget cycle and if we don’t move now we’ll lose our funding!”

Remember – they call it “strategic” for a reason. The plan should convincingly describe how what you do now will impact the future. The plan should also recognize how different departments and functions are impacted and how this might result in necessary changes.

Don’t hide the process “behind closed doors.”

Whether you think of strategic planning as a dedicated project with a beginning, middle, and end, or as a process that is permanent and ongoing, it needs to be managed collaboratively. By that I mean that many people may be involved from different parts and levels of the organization. They all need to understand something about the process and what it’s trying to accomplish.

Partly this involvement is necessary to obtain “buy-in” from the different “stakeholders” spread throughout the organization. (This may also involve key players outside the

organization as well, such as suppliers, customers, and members.) For the process and its results to have credibility, people need to understand what's going on and how their own contributions and needs are being considered.

I'm also coming to believe that collaboration should be a key element in a strategic planning process. People shouldn't just be surveyed for their input, they should also feel an involvement and sense of ownership over the process. This collaboration should not just be limited in a discrete set of time bounded tasks but should, if possible, extend throughout the duration of the process.

One way to accomplish this sense of collaboration, regular readers of this blog will not be surprised to learn, is that the tools of social media and social networking can be used in support of the strategic planning process. Examples are securely managed blogs, wikis, and discussion forums.

Use of collaborative tools will help make the process more open and transparent. This doesn't mean, of course, that sensitive, personal, or competitive information should be openly published and discussed. But it does mean that strategic planners should use modern media to involve more people in discussions of where the organization is going and how it should get there.

Ten Realities of Managing and Using Technology to Generate Business Value⁵

Years of managing, studying, developing, consulting on, and using information technology have taught me the realities of using technology to help generate business value. Here are ten of these realities:

1. Technology doesn't manage itself.
2. If you let technology manage you, you lose.
3. Implementing a technology based solution without understanding the costs is a big mistake.
4. Don't let technology vendors dictate your business strategy.
5. Customers care more about whether your products or services help them than they do about what technology you use.
6. Just because you adopt a new technology doesn't mean the users of your old technology will disappear overnight.
7. Getting rid of old technology isn't free.
8. If you're not in the technology business, you probably should leave developing new technology to others.

5. Originally published January 15, 2008

9. Just because a technology is not new and shiny doesn't mean it won't continue to be useful.
10. Many technology based projects are mostly about business and process change, not about technology.

Can you think of more?

Don't Make "Ready, Fire, Aim!" Your Organization's Facebook Strategy⁶

If you are thinking of setting up a Facebook or MySpace page to promote your business, brand, association, or agency, you should first read Jeremiah Owyang's [Why You Need to have a Strategy before you make a Facebook Fan Page NOW!](#)

In a nutshell, Jeremiah provides some practical tips that boil down to “first figure out why you want to do this before you do it.”

In the little time I've been using Facebook I've already seen a series of inactive pages emerge. Someone wanted to set up a personal or organizational page, was impressed with how easy it was to create a page, invited some friends in, then realized, “hey, this is a lot of work!” and started casting about among friends to get help. The result: Facebook (and MySpace) are littered with inactive and seldom visited pages originally created by individuals and organizations enthralled by the idea of connecting with a “community.”

This plea for planning is being heard a lot lately. Another example is Maish Nirchani's [Planning & Sustaining Wiki-based Collaboration Projects](#). Nirchani's topic is the use of wikis as tools to support collaboration. Nirchani's framework presents a planning process as a balanced approach that is structured enough to provide guidance but simple enough not to result in “analysis paralysis.”

I've published my own approach to [social media strategic planning](#). It is intended for use in situations where a large organisation is seeking a corporate wide strategy to support a wide range of corporate functions with a variety of social media. The questions that Jeremiah asks in his post are much more targeted and should be much easier to answer.

One of the reasons there seems to be more attention being given to strategy and planning these days may be that technology and technology related costs are no longer the barriers to organizational change that they once were. People can jump in and get social media projects started without the maddening questions that I.T. departments like to ask such as “Is this secure?” and “Who's going to support this?”

6. Originally published November 13, 2007

Given the increasing complexity and sophistication of tools that Facebook is providing that enable targeting and communicating with specific types of individuals, you owe it to yourself to think these things through. Time is money. Maintaining multiple web presences and multiple web based communities takes time, attention — and planning.

Maybe Business and I.T. Just Need to Collaborate Better⁷

Jeremiah Owyang has an interesting discussion going on over at his blog in [The Challenges of Social Media in the Enterprise, why Business and IT need to align](#). He discusses the perennial smack-down between Stodgy Old Corporate I.T. and Shiny New Social Software Supporter. That's the one where I.T. wants to make sure systems work together and can be supported. "Shiny Supporter" just wants to get the job done without I.T. getting in the way.

There's something reassuring about this argument that just won't go away. The list of issues Jeremiah mentions should be enough to give any literate corporate manager with any strategic sense reason to pause and think about bypassing I.T.

My favorite "reason" why I.T. needs to be involved is the Orphan System. That's when the original business supporter who championed a unique solution has moved on to bigger and better things, and newer systems are starting to take away users. But the Orphan System is still there being updated, maintained, taking up server space, and requiring periodic upgrades, maybe even service and support contracts and software license renewals to keep it secure. Every now and then somebody asks, "Can't somebody please stick a fork into it?"

Unfortunately, "sticking a fork into" an Orphan System isn't as easy as just pulling the plug, especially if the system's data store contains customer data that's needed for possible regulatory or audit reasons. If there are many orphan systems to consider, especially if the corporation has been cobbled together from a steady string of mergers, the cumulative retirement costs can be quite steep.

Smaller, newer, and more agile companies may think they are immune to these types of issues. To some extent that's true. Problem is, business unit managers with bottom line responsibilities don't like to think about such mundane details, and many times it's the mundane details that the I.T. department has to sweat.

I've written before about the "alignment" issue in [How To Develop a Business-Aligned Social Media & Social Networking Strategy](#). Next to [Business and I.T. Must Work Together to Manage New "Web 2.0" Tools](#) (which I co-wrote with Jeremiah) that's one of my most popular posts.

7. Originally published October 24, 2007

The model it describes of “alignment” between business and I.T. assumes there is a unified approach to I.T. management.

Maybe instead we need to think of more collaborative approaches to aligning I.T. with business. Maybe there are situations where an operating department should have the authority and responsibility to contract directly with I.T. service suppliers. After all, when it comes to social media adoption, aren't there situations where the total costs will not be technology related but related more to the staff costs associated with changed business processes?

In such situations, maybe it does make sense to put the onus of responsibility on the business unit for overseeing details that the I.T. department has usually had to deal with. — security, log-ons, data sharing, service, support, etc.

This may not be as outlandish as it sounds to a dyed-in-the-wool corporate I.T. type. After all, many “web 2.0” applications are remotely managed anyway, so why not seek service and support from the vendor? Plus, once the need goes away, so does the application. (But not necessarily the business processes, which the business unit should be most competent about changing.)

What roles would I.T. play in these more “collaborative” arrangements? Perhaps the I.T. department should provide more management, oversight, and strategic direction. When it comes to making sure the I.T. resource satisfies the business need, however, that's the business unit's responsibility.

There are already examples of companies adopting this more collaborative approach to I.T. support. One area where this has occurred is in the working out of I.T.'s responsibility for the corporate web site. In some companies, the division of labor is spelled out in terms of responsibility for content (the business unit) and responsibility for hardware and software (I.T.). If such a division of labor has not been worked out, I think there is a high probability that business interest in adoption of social media will exacerbate any existing tension over who is responsible for doing what.

Getting Real about Social Networking Adoption⁸

Professional networking guru Scott Allen left a thoughtful comment on my blog post [Network Unto Others As You Would Have Others Network Unto You](#) a couple of days ago. He noted that people don't share the same personal and professional networking priorities.

8. Originally published September 26, 2007

The ability to tailor one's preferences, he suggested, seems to be a desirable feature for people involved in networks where people will come into contact with others who have different views of how open or closed they are to sharing information.

One of the realities of the expansion in the number of personal and professional online networks in recent years (such as Facebook, LinkedIn, and their brethren) is that each one promotes a different definition of "friend." Add to that how people differ concerning their willingness to mix personal and professional networking in a single system (some care about the distinction, others don't) and you begin to see potential compatibility problems across networks.

I wrote about related topics last May in [Who Are You and Why Are You Calling Me That?](#)

Even within the same network we have differing views of relationships. In Facebook, for example, if you add a little application called "Top Friends" to your profile, you can designate a subset of your "friends" as "top friends."

I have three people in my "top friends" list. Does that mean everyone else is a "non-top friend"? Am I running the risk of hurting the feelings of someone who thinks he or she should be on that list?

Okay, I'll admit I'm not losing any sleep over that. As disparate as social networks are, there are efforts afoot to facilitate [social network portability](#) across networks. I'm sure progress will be made along those lines, eventually.

A more serious consideration for me is that I need to "professionally network" with people who have no idea what Twitter is and for whom Facebook is the height of technological sophistication [don't worry, I'm aware how technologically sophisticated Facebook is]. I don't mean those comments in a disparaging way. My clients range from social software company CEO's to died-in-the-wool press-the-flesh marketing types who care more about body language than emoticons.

Kfir Pravda writes about a related topic in [Tailor Your Social Media Strategy to Your Industry's Rules of Engagement](#). Among other things, Kfir writes about "the myth of social media openness." Kfir contrasts the ethos of Internet industry professionals with, say, telecommunications company professionals who tend to be much more wary when it comes to "social media openness."

Now, before you go running to your keyboard, I'm well aware of demographic differences and how early and late adopters behave. I've been a technology consultant for a long time. Some people "get it" right away, some people come along after a while, and some people never "get it." Telling people that everything will be hunky-dory after all us baby boomers die off just doesn't cut it when customers need help today when dealing with the communications practices of diverse groups.

This need to work with multiple groups is nowhere more apparent than when addressing the communication practices of professional and trade associations. There you typically find very large numbers of practicing professionals drawn together and sharing a common set of professional and social characteristics. You will also typically find a very wide range in social media openness that strongly impacts development of effective strategy and tactics for using technology to promote communications, relationships, and information sharing.

In such diverse circumstances it pays to be clear-thinking about what is really involved in getting "everyone on the same page." One approach is not to start with "web strategy" *per se* but rather to start with the need to align overall communications strategies with an organization's unique business vision. In the process this may very well mean defining social networking and social media initiatives that combine both "traditional" and "social" media so that both "early adopters" and "late adopters" can participate in the same program. (I think the technical term for this is "not putting all your eggs in the same basket.")

This approach may seem quite basic to a lot of folks. That's to be expected. Having witnessed a variety of technological revolutions, by now it's quite obvious to me that, in the real world of corporations, organizations, and government agencies, we don't always have the luxury of dealing with 20-something technological wizards who are constantly glued to their keyboards and cell phones.

As Morpheus said so long ago, "Welcome to the real world, Neo."

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