



STRATEX SOLUTIONS



# Embedding Strategic Planning as an Organizational Discipline

2023 STERLING ANNUAL CONFERENCE

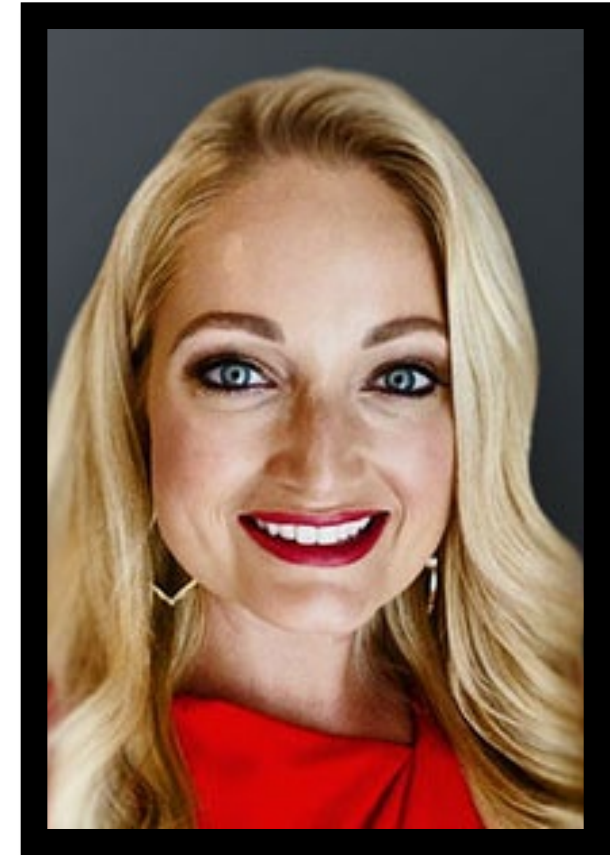


ELEVATING  
PERFORMANCE  
EXCELLENCE

May 2023



**Raina Knox**  
CEO & Founder



**Erin McCoy**  
Director of Professional Services



# Building a Foundation for Future Success

- Why is embedding strategic planning as an organizational discipline important?
- What role does a maturity assessment play in identifying the most important focus areas for elevating your strategic planning effectiveness?
- How can employees be empowered as strategic partners?
- What are the most important elements of effective communication as the backbone of embedding strategic planning as an organizational discipline?
- What are the differentiating factors between operational and strategic planning?



# The Importance of Strategic Planning

Shaping the  
Future of Your  
Organization




Readiness for opportunity  
makes for success. Opportunity  
often comes by accident;  
readiness never does.

Sam Rayburn

# Workshop Take Aways

## Strategic Planning Maturity Assessment Guide to Elevating Strategic Plan


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**Strategic Planning and Execution. Delivered.**

**Strategic Planning Maturity Assessment**

**INSTRUCTIONS:** Assign each statement a score from 1 to 5 (1=Strongly Disagree - 2=Disagree - 3=Agree - 4=Strongly Agree). Sum the total score (120 points max.). To get the score as a percentage, divide the sum of the points by 120, then multiply by 100 (Example: score of 80 points/120 x 100 = 68%). The higher the score, the higher the organization's level of strategic planning maturity.


	Strongly Disagree	Disagree	Agree	Strongly Agree
<b>Leadership:</b>				
1. Our leaders set and communicate clear strategic direction.	4	3	2	1
2. Our leaders promote and uphold ethical behavior across the organization.	4	3	2	1
3. Our leadership actively supports the execution of our strategic plan.	4	3	2	1
4. Our leadership is committed to continuous improvement and innovation.	4	3	2	1
5. Leadership decisions are transparent and communicated effectively.	4	3	2	1
<b>Strategy:</b>				
6. Our strategic planning process systematically evaluates our organization's internal and external environment.	4	3	2	1
7. Our strategic objectives align with our organization's mission, vision, and values.	4	3	2	1
8. Our organization has a clear process for prioritizing strategic initiatives.	4	3	2	1
9. Our strategic plan takes into account our competitive environment.	4	3	2	1
10. We have a clear process for updating our strategic plan to adapt to changes.	4	3	2	1
<b>Customers:</b>				
11. Our strategic planning process includes identifying and understanding customer needs and expectations.	4	3	2	1
12. Our organization's strategy aims to build and maintain customer relationships and loyalty.	4	3	2	1
13. We consider customer feedback in our strategic planning.	4	3	2	1
14. We evaluate customer satisfaction and use the results in our strategic planning.	4	3	2	1
15. Our strategic plan includes specific goals related to improving customer satisfaction.	4	3	2	1

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[www.stratexsolutions.com](http://www.stratexsolutions.com) 941.210.0868 [contact@stratexsolutions.com](mailto:contact@stratexsolutions.com)

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# Identifying Opportunities for GROWTH



**STRATEX  
SOLUTIONS**

EMPOWERING ORGANIZATIONS  
TO MEET THEIR GOALS  
through the art & science of truly  
exceptional strategic planning

**A Comprehensive Guide to Elevating Your  
Organization's Strategic Plan**

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**Leadership:**


	Strongly Agree	Agree	Disagree	Strongly Disagree
1. Our leaders set and communicate clear strategic direction.	4	3	2	1
2. Our leaders promote and uphold ethical behavior across the organization.	4	3	2	1
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# The Strategic Planning Maturity Assessment as a Baseline

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**Measurement, Analysis, and Knowledge Management**

16. We measure the effectiveness of our strategic plan through well-defined metrics.	4	3	2	1
17. Our organization uses data and analytics to inform our strategic planning process.	4	3	2	1
18. Our organization has a systematic process for managing knowledge and sharing it across the organization.	4	3	2	1
19. We learn from our past strategic successes and failures.	4	3	2	1
20. Our organization has a consistent method for monitoring strategic initiatives.	4	3	2	1

**Workforce:**


21. Our organization engages all levels of employees in the strategic planning process.	4	3	2	1
22. Our employees understand their roles in executing the strategic plan.	4	3	2	1
23. Our strategic planning process includes workforce development and capacity building.	4	3	2	1
24. Our organization's culture supports the execution of our strategic plan.	4	3	2	1
25. Employee feedback is considered in our strategic planning process.	4	3	2	1

**Operations:**

26. Our organization's strategy effectively integrates and aligns our key operations.	4	3	2	1
27. Our strategic planning process includes risk assessment and management.	4	3	2	1
28. Our strategic plan includes specific operational goals and targets.	4	3	2	1
29. Our strategic plan is well-documented and easily accessible to all relevant stakeholders.	4	3	2	1
30. Our strategic plan includes contingency plans for potential operational challenges.	4	3	2	1

SCORE: \_\_\_\_\_

**Empowering organizations to reach their goals.**  
Congratulations on successfully completing the Stratex Solutions Strategic Planning Maturity Assessment! Now, it's time to take your strategic planning journey to the next level. Submit your results to [contact@stratexsolutions.com](mailto:contact@stratexsolutions.com) to unlock a personalized feedback report that reveals specific improvement opportunities in the three key areas with the most potential for growth. In addition, you will receive an evaluation of your overall score compared to other organizations who have undertaken this assessment, all offered free of charge!

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# Workforce Understanding and Engagement



Empowering employees as strategic partners

- Transparent communication
- Training and development
- Employee involvement
- Clear goals and expectations
- Two-way communication channels
- Recognition and rewards
- Leadership support and involvement
- Continuous communication and updates



# The Power of Strategic Planning Teams



**Cross Functional Teams**



**Diversity of Thought,  
Experience and Work  
Approaches**



**Organizational  
Knowledge is Embedded  
Throughout**



**Builds Transparent and  
Collaborative Culture**





# Importance of Cross-Functional Teams in Strategic Planning

Leveraging Diverse  
Perspectives for  
Success



THE RITZ-CARLTON

- Emphasizes employee engagement in strategic planning
- Empowers employees to make decisions and provide exceptional customer service
- Fosters a sense of ownership
- Aligns daily activities with the strategic goal of providing exceptional customer service



# Building Cross-Functional Teams



## Forming the Foundation for Collaboration

- Key Steps:
  - Define purpose and objectives
  - Identify required skills and expertise
  - Select team members
  - Establish clear roles and responsibilities
  - Foster a collaborative environment



# Selecting Team Members

- Creating a Balanced and Complementary Team
  - Expertise and skills
  - Functional representation
  - Collaboration and communication abilities
  - Leadership potential
  - Diversity





# Managing Capacity Issues in the Strategic Planning Process

- Balancing Workload and Strategic Engagement
  - Prioritize and streamline
  - Optimize resources
  - Time management
  - Incremental involvement
  - Collaboration and delegation



# Incentivizing Employee Participation

## How Do You Motivate Employees in an Overcapacity Environment?

- Career advancement opportunities
- Special projects
- Bonuses
- Employee celebrations for significant achievements







# Effective Communication: The Backbone of Strategic Planning

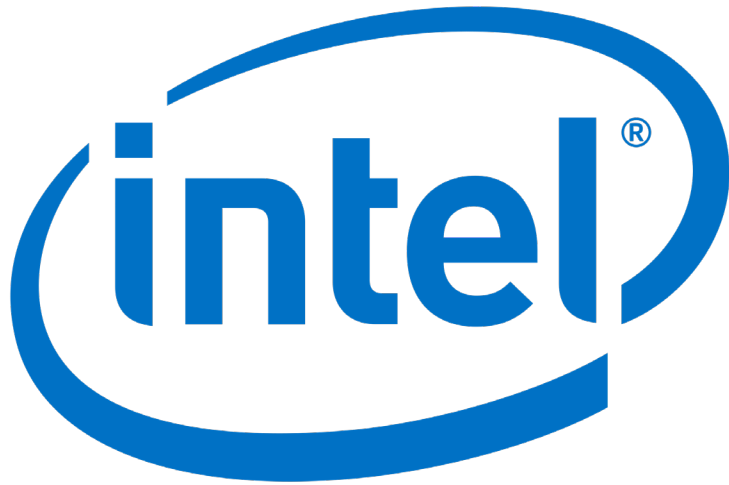
- Importance of clear, transparent communication in strategic planning
- Role of leadership in communicating the strategic plan
- Role of strategic planning team members in evangelizing the strategic plan



- “Transformation Agenda”
- Fostered buy-in and understanding



# Cascading Objectives: Linking Strategy to Individual Performance



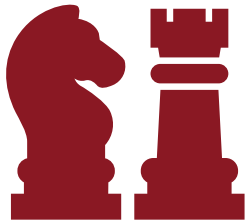
- OKR (Objectives and Key Results) approach
- Starts at the organizational level, then cascaded down to the individual level
- Ensures Alignment

- Process of cascading objectives from divisions to departments to individuals
- Importance of aligning individual performance evaluation with strategic objectives



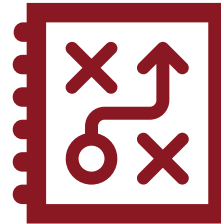
# Operational Planning vs. Strategic Planning

## Stratex Strategic Framework



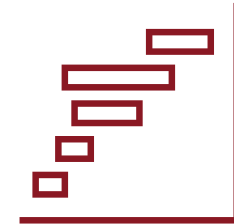
### Strategic Plan

Mission, Vision, Values with Goals and Objectives at organizational level



### Tactical Plan

Identifies specific strategies to execute long term goals and objectives at organizational level



### Operational Plan

Identifies departmental work plan annually



# Operational Planning vs. Strategic Planning

- Understanding the differences
  - Operational focuses on day-to-day activities
  - Strategic encompasses long-term goals, competitive positioning, and future-oriented decision-making
- Integration
  - Ensures synergy and alignment across the organization





# Standalone Operational Planning

## Navigating the present

- Setting targets
- Allocating Resources
- Developing action plans to achieve short-term objectives
  - Production scheduling, inventory management, etc.







# Integration of Strategic Planning



Charting the  
Course for the  
Future



- Operational planning ensures customer orders are filled and delivered promptly
- Strategic planning involves expanding into new markets and developing innovative technologies like Amazon Web Services and mobile applications



# Embedding Strategic Planning Creating Alignment Across Levels

## Engaging Leaders and Employees

- Leaders must:
  - Communicate strategic direction and cascading goals
  - Ensure consistency
- Employees must:
  - Understand how their job aligns with the overall strategy
  - Develop a sense of ownership





# Governance—the Key to Agility

- No changes to the plan or approval of significant projects or approved strategies occur without governance approval
- Strategy timeline changes
- Review and approval of new projects that:
  1. Have cross-department impact
  2. Do not have budgetary approval
  3. Require resources above a certain threshold level
- Consider using business case or cost-benefit analysis tools for new projects to support data-driven decision-making





# The Importance of Innovation in Strategic Planning



- Innovation Plays a Key Role in:
  - Seizing opportunities
  - Enhancing competitiveness
  - Driving growth and profitability
  - Adapting to change
  - Fostering a culture of creativity and engagement
  - Improving operational efficiency
  - Enhancing customer satisfaction
  - Encouraging employee motivation and retention



# An hour of planning can save you 10 hours of doing.

Dale Carnegie

## Best Practices for Strategic Planning

- Guiding Principles for Success
  - Clearly define the Mission, Vision, and Values
  - Involve cross-functional teams
  - Regularly assess internal/external environments
  - Foster a culture of innovation and adaptability
  - Establish metrics and milestones to measure progress
  - Ensure rigor and adherence to the plan through organizational governance





# Overcoming Challenges

Turning Obstacles Into Opportunities Requires:

- Effective communication
- Leadership support
- Focus on continuous learning and development



“20% Time”



# The Power of Strategic Planning

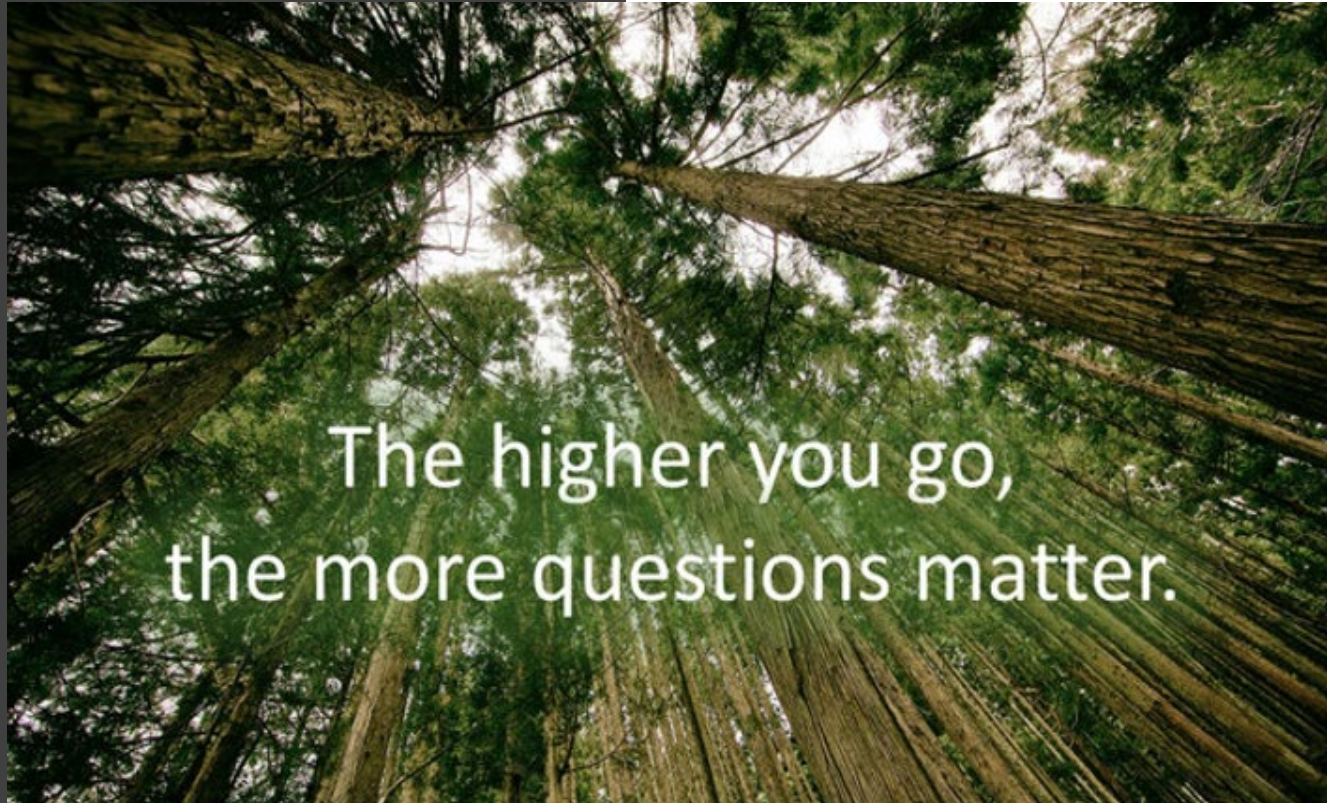
- Nurturing a Culture of Collaboration and Strategic Thinking



- Near bankruptcy
- Changed strategy and focused on innovation, design, and user experience
- Led to groundbreaking products like the iPod, iPhone, and iPad

# Conclusion

## Embedding Strategic Planning as an Organizational Discipline



- The Strategic Planning Organizational Maturity Assessment
- Employees as Strategic Partners
- Communication
- Operational vs Strategic Planning
- Governance
- Innovation





*Thank You!*

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