

————— E-book —————

Strategic Planning

How to do it and for whom?

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Close your eyes for a minute and think: you are in one of those traps in the Indiana Jones' movie, more specifically, the one where you are in a

cave and reach a point where several entrances appear in front of you, and you need to choose which path to follow , hoping that one will take you out of this adventure.

It is precisely to help during this moment of choice, that Strategic Planning - SP arises, in the imagined situation it may not help much, considering that everything is unknown. Oops, but wouldn't the daily lives of organizations be as unknown? Or even, are there fortune tellers within organizations that anticipate pandemics, economic, political and similar crises? I don't know around there, but I still haven't known that reality. That said, let's draw a possible map to get us out of the caves of the unknown and make a well-known and applicable SP.

Adjusting the Compass

So that the journey into the unknown to have any chance of working out (because sometimes we have the instruments and we don't know how to use them), we need at least a compass, which in our case will be: **what is the objective of the Strategic Planning that I am preparing?** And on this point we need to be mature, safe and mainly sincere about why we are building one, as it can only be kept in the drawer; hang on the organization's walls and not be implemented; have the documentation to deliver to the audit; or even, implement, monitor and transform the organizational reality, but for that we will need ALL the employees of the organization, but this is a conversation that we will have a little ahead.

Do you know why the definition of the goal in making a SP is extremely important? Because it will avoid the use of physical and financial resources in unnecessary activities, in addition to using the hours of everyone involved, and not to mention, but already mentioning the frustration of doing a very legal and effective job, to be shelved (as in most times it is). So, **WHENEVER** doing strategic planning work try to identify what this SP is being developed for.



Calibrating the pointers

After we have our compass (this is essential! And starting from the idea that an effective SP will be carried out), the next step of our journey is to calibrate the pointers. And how do we do that? Through some steps, which can be called 'methodology applied to the issue'. For this, the first action to be taken towards choosing the correct entry will be:

- In-depth Studies, Benchmarking and Theoretical Alignment

We live in a globalized world, full of access to information and with a lot of loose data, and it is precisely for this reason, especially speaking of Strategic Planning, that many people think they know and dominate the matter. Or have you never heard something like: "Ah but it doesn't need a mission and vision", "oh this is simple, we do it like this and like that" or even, "in my experience, to participate in meetings on this topic we did it like this", and to escape or to minimize the impacts of this situation, it will be necessary to study and study the main specialists in the field, articles, books, magazine articles and the like that provide a good theoretical basis, however, this alone will not be enough.

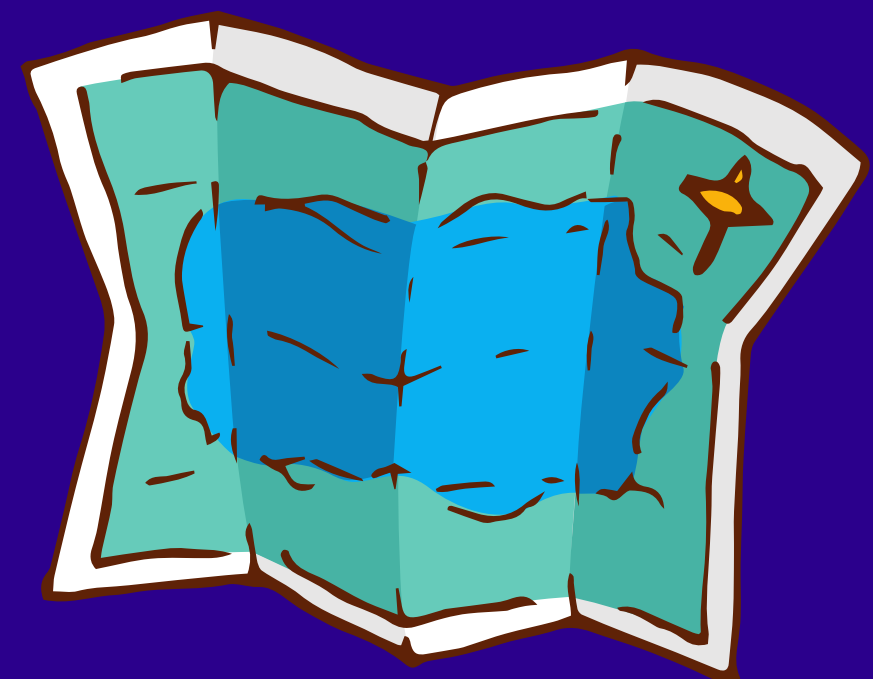
It is necessary to go beyond theory, and for that we dive into benchmarking with other organizations, because only

then will it be seen how the theory has been applied in practice in other institutions. And there are other gains in these bridges that end up being built, as materials, practices and procedures begin to be exchanged that favor ideas/insights for their own journey.

And to finish this point, once you have put so much, but so much in your backpack, it is time to put everything on the table, and align by theoretical similarity everything that has been collected so far. In practice, this is when you will see what several authors understand and talk about mission, vision, values, objectives, guidelines, guiding and similar, as well as all this is being used by other institutions and what will be the best terms and practices to be used in implementation for your organization, of course, respecting the objective and methodological choices made so far.

Drawing the map below

After we have a compass, adjust the pointers, it's time to draw how will be the map we will follow and for that, we will need:



- Logical construction, Prototyping and Testing

We know that we are in a VUCA world (Volatility, Uncertainty, Complexity and Ambiguity), or more recent, BANI world (Brittle, Anxious, Non-linear, Incomprehensible), the name is not always the most important, but for our journey out of the cave full of paths what will matter most is to have a logical construction of everything we do, and once again remembering what is the main objective of the SP.

Yes, I know that a thought must have passed around more or less like this: “ah, but we always build things in sequence”, but let's be honest, is it a logical sequence?!

In search of agility, fast deliveries, shorter deadlines and discussions, many times the planning is done in parallel or multiple activities and even worse, by several people, and when putting this puzzle together, the pieces do not always fit and the impact of this will only be felt over time and its users complaining that nobody understands 'that there', and many times (almost always) or whoever did understand it.

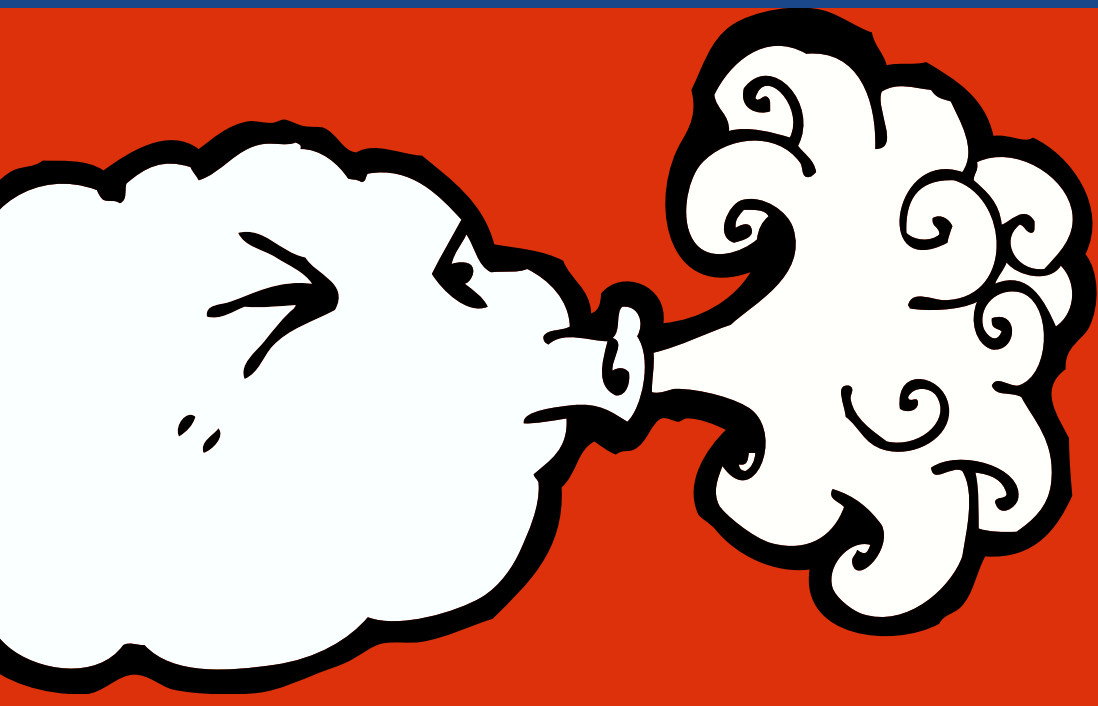
To prevent this from happening it is important that there are some definitions first, a logical unfolding, sequenced and drawn on how our map will be traced, and for that we must use prototyping.

Okay, before you say you don't have creativity, you don't know how to make a prototype, I want to tell you that we can do this on a blank sheet of paper with any pen, just writing something like this:



The prototyping stage is when you will test all previous alignments made, in other words, alignment of terms, concepts, practices, and how far you will go with your planning.

And to conclude this block, in order to make a better assessment of everything that has been built so far, it is really important to carry out testing. However, it is not just any test that will be applied, but testing by laypeople, in other words, on people who do not understand strategic planning and who have not been involved until then. It is recommended to invite people with lower levels of education, because when we transform the most complex speech into language accessible to everyone in the organization, this is where we can have the total success of our SP, after all, those who do not understand what they do tend not to commit to what you should do.



Listening to the whispering winds

So far we have used a compass, pointers and a map, but there is something that is also necessary to draw a good plan, listen to the winds, or in practical terms, listen to the organization.

- *Extended search, Interviews and Checkpoints*

In view of the objective of our Planning, which is to be effective and applicable, it will be very important to listen to everyone in the organization, and a quick and cheap way to do this will be through online researches in any tool available on the market. She, the research, will be sent to everyone in the organization, without exceptions, this is a moment of participation and that usually brings true contributions that do not appear in interviews in person.

The research does not usually have an expressive participation in numerical question, however, it will bring truths, mainly on the part of dissatisfied collaborators, because they will answer thirsty and such opinions will be valuable when evaluating the organizational values, objectives and goals to be traced (which are questions asked of them, which will be good inputs, however, depending on the senior management could be ignored or not. Let's be honest here, ok ?!).



While research is taking place, it is very common, we carry out in-depth interviews with the organization's high command and key experts. They will bring visions, notation, opinions and practices that reveal the organizational culture, positioning and possible market tendencies. Note: stay tuned to the speech what we want to be versus what we really are.

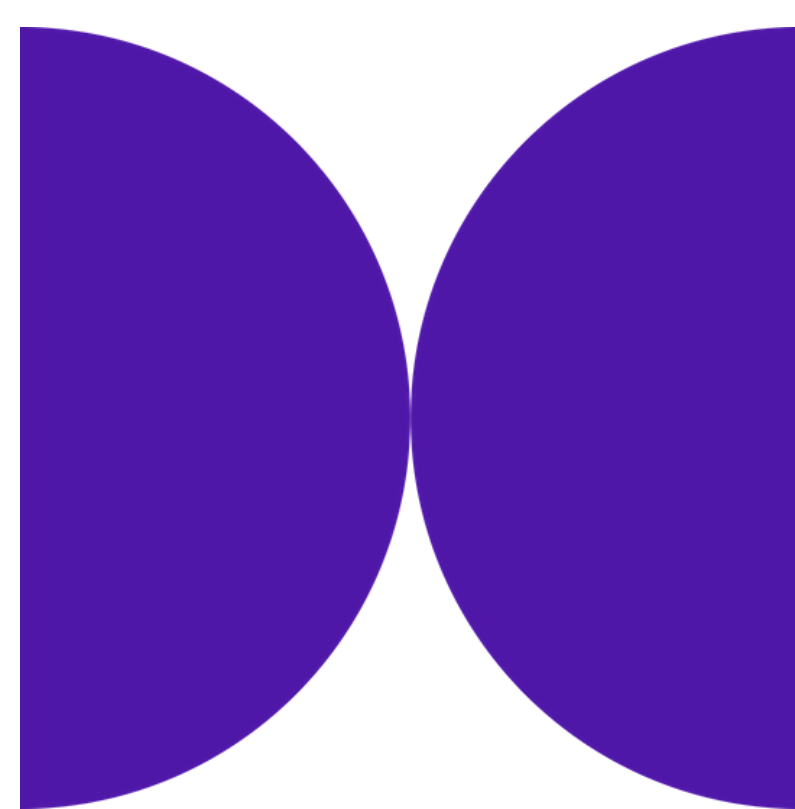
Example: in the interviews, statements may appear indicating that the company is innovative, cool and modern, but when reading the results of the research and talking to other employees this can fall to the ground, and when falling it will cause an abyss between the SP designed and day by day, and we don't want that.

A good tactic to reduce the gap mentioned above, are the control point meetings, or status report, as it will be through these meetings, made on a regular period, between the technical team of the SP elaboration with the sponsors of the action that we will be able to align what they want with what is being collected and verified in the organization. Do not underestimate the impact of these meetings, let alone act without patience, because here, all your negotiation skills will enter the field and be tested, all in favor of a SP that is not so cool from the organizational reality and objective at successful implementation and monitoring.



The lessons of a manga and anime character

We are already well prepared with all the items we put in our backpacks up to here, and in addition, we heard the winds, so the choice of the best entrance to get us out of the cave is almost certain, only to finish our survival/experience kit we will need to listen a specialist in strategies in the world of manga and anime (comics and Japanese drawings), Yugi Muto, because in the anime, in the *first minutes of episode 2 ([click here and check it out](#))*, the character explains, briefly, that in order to win we must not go with our strongest characters only, it is necessary to have a balance between monsters, magic cards and traps, which in our case can be seen as:



- Dynamic Workshops, Senior Management and Communication Plan

The **workshops** are tools for elaborating, validating, testing and implementing the work done in Strategic Planning, and are usually done with one person speaking and others listening, or someone conducting activities while the public works, but it does not have to be that way, as we elaborate a dynamic, fun meeting with playful and logical activities for work, the public will be surprised and the response to the SP will be positive, which will bring a freshness and an air of novelty to the work done so far, so always think about it when planning this event.

Senior management has been mentioned a few times in this text, and here it is highlighted to indicate that it must be committed and sponsoring the work that is being developed, even if it does not follow so closely, it will need to give its approval to what is being developed.

And finally, having a good **communication plan** and the communication area at your side will be extremely important, as it will facilitate the development of strategies and innovative and assertive practices for the institution. Here is a reminder that it is much more than sending e-mails and/or meetings, it is sitting next to the material preparation, it is discussing the best ways to do it, it is listening to your target audience, because only then will be implemented SP with involvement of everyone in the organization and with the desired commitment.



And so, balancing our cards just like Yugi, and with the tools to guide us we can walk through the cave tunnels, just like Indiana Jones, but with more challenges, because the cave is life and the entrances are choices that we make every days that take us to places we often don't imagine, so remember to always have your compass with the set pointers, draw your map, listen to the whispering winds and Yugi's strategic lessons, which you will possibly succeed in your journey.

[Yu-Gi-Oh episode link!](#)





VERSIONS IN OTHER LANGUAGES

**Espanhol: Planificación
Estratégica: ¿cómo
hacerlo y para quién?**

**Português: Planejamento
Estratégico: Como fazer
e pra quem**

Project developed through the partnership of the chapters:

