


Strategic Planning & the HR Professional



Why do we plan?

- ▶ "Would you tell me which way I ought to go from here?"
- asked Alice
- ▶ "That depends a good deal on where you want to get"
- said the Cat
- ▶ "I don't really care where"
- replied Alice
- ▶ "Then it doesn't much matter which way you go"
- said the Cat
- Lewis Carroll (1865)



- ▶ We plan so we will move in a specific direction

Why do we plan?

- ▶ "Tell me...why does poor planning on your part ... constitute an emergency on my part?"



- ▶ We plan to ward-off potential reoccurring crisis

Why do we plan?

▶ "If you don't plan for yourself...
you will become part of someone else's plan"



▶ We plan so we can be the leader of our own ship(s)

Overview:

- ▶ I. Foundation & the Big Picture
- ▶ II. Annual Review & Assessment
- ▶ III. Goal Develop for upcoming year
- ▶ IV. (Brief note on) Implementation



I. Foundation - Big Picture Vision - Mission - Values

▶ Where are they going?
▶ 'Where no one has gone before'

- ▶ Vision
- ▶ Direction
- ▶ Ideal future state



Vision Examples

- ▶ *'Put an 'Apple' on everyone's desk'* - Microsoft
- ▶ *'To bring inspiration & innovation to every athlete* in the world'*
 - ▶ *'If you have a body, you are an athlete'* - Nike
- ▶ *'A world without Alzheimer's disease'* - Alzheimer's Assoc

I. Foundation - Big Picture Vision - Mission - Values

- ▶ Why are they here?
- ▶ *'To seek out new life and new civilizations'*

- ▶ Mission
- ▶ Purpose
- ▶ Service provided
- ▶ Who served



Mission Examples

- ▶ *'To give customers the most compelling shopping experience possible'* - Nordstrom
- ▶ *'To connect the worlds professionals to make them more productive & successful'* - LinkedIn
- ▶ *'To help bring creative projects to life'* -Kickstarter

I. Foundation - Big Picture Vision - Mission - Values

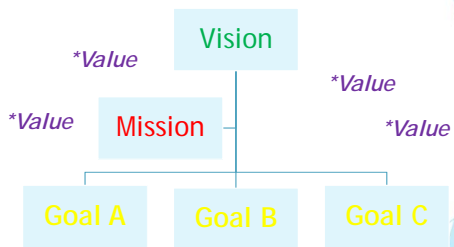
- ▶ Prime directive:
 - ▶ *Non-interference in other cultures*
- ▶ Values
 - ▶ What you stand for
 - ▶ Code of conduct



Value Examples

- ▶ *Integrity / Respect*
- ▶ *Service*
- ▶ *Safety*
- ▶ *Teamwork*
- ▶ *Accountability*
- ▶ *Compassionate care*

Strategic Planning 'Map'




I. Foundation - Big Picture
Vision - Mission - Values

▶ Reflection:

▶ What is your Organizations:

- ▶ Vision Where are you going / Direction?
- ▶ Mission Why are you here / Purpose?
- ▶ Values What do you stand for / Core beliefs?



I. Foundation - Big Picture
Vision - Mission - Values (VMV)

▶ Group Discuss:

▶ (1) Your Organizations VMV & how your department:

- ▶ Maintains the Mission
- ▶ Gets the organization closer to the Vision
- ▶ Upholds/supports Values



▶ (2) Is there any disconnect between:
what is preached ... and what is practiced?



II. Annual Review & Assessment

▶ A. Review previous years goals

▶ B. Conduct assessment




II. Annual Review & Assessment

▶ Options to Assess 

- ▶ Environmental Scan
- ▶ Resource Audit
- ▶ SWOT (Strengths-Weakness'-Opportunities-Threats)

II. Annual Review & Assessment

▶ SWOT Process 

- ▶ 1. Identify & discuss S, W, O, T
- ▶ 2. Prioritize
- ▶ 3. Strategize how to:
 - ▶ Capitalize on S & O
 - ▶ Address or guard against W & T

II. Annual Review & Assessment

▶ 1. Identify & Discuss


SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats

II. Annual Review & Assessment


- ▶ Reflection:
 - ▶ Identify your departments (or organizations) Top 2-3:

Strengths	Weakness
Opportunity	Threats
- ▶ Group Discuss:
 - ▶ What do your 'lists' say about the direction you should take?



II. Annual Review & Assessment

- ▶ SWOT Process
 - ▶ 1. Identify & discuss S, W, O, T
 - ▶ 2. Prioritize
 - ▶ High priority *
 - ▶ Mod priority o
 - ▶ Low priority ~
 - ▶ 3. Strategize how to:
 - ▶ Capitalize on S & O (emphasis on high priority)
 - ▶ Address or guard against W & T (emphasis on high priority)



III. Goal Development

- ▶ *"Planning is bringing the future into the present, so that you can do something about it now"* -Alan Lakein
 - ▶ Goals should:
 - ▶ Maintain Mission
 - ▶ Achieve Vision
 - ▶ Uphold Values
 - ▶ Capitalize on Strengths & Opportunities
 - ▶ Address Weaknesses & Threats



III. Goal Development

- ▶ Specific
- ▶ Measurable
- ▶ Reasonable / Realistic




III. Goal Development



III. Goal Development

▶ Reflection:

- ▶ What are 2-3 goals you think your department (or organization) should be focusing on?



IV. Implementation

▶ Turn Goals into Action

▶ *"Plans are only good intentions, unless they immediately degenerate into hard work" - Peter Drucker*



- ▶ 1. Write **objectives** to reach goals
- ▶ 2. Discuss **key performance indicators (KPI's)**
- ▶ 3. Develop **systems**
 - ▶ Measurement systems
 - ▶ Tracking systems
 - ▶ Communication systems
 - ▶ Support systems

Strategic Planning

▶ *"Plan for what is difficult while it is easy, do what is great while it is small."*

▶ *The difficult things in this world must be done, while they are easy; the greatest things in this world must be done while they are still small.*

▶ *For this reason, sages never do what is great, and this is why they achieve greatness"*

▶ Sun Tzu - Chinese General - The Art of War 400BC