

Strategic planning - some hints and tips

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What is 'strategic planning'

- A process to put on paper:
 - **where** the organisation wants to go – perhaps an imaginative vision; or simply **what** practically it wants to achieve over the longer term; or a statement of strategic intent
 - **why** – how achieving this fulfils the purpose of the organisation; the opportunities that the strategy will use and threats it will deal with; the strengths it will build on and weaknesses it will eliminate or mitigate – in short, **analysis**
 - **how** – the actions to be taken; resources to be allocated; priorities
 - **who** is responsible
 - **how do we know we have succeeded** – objectives, reporting methods and dates, reviews of progress
- Range of different approaches
 - **From** top-down, highly structured (corporate) planning – the plan dictates the direction
 - **To** decentralised, 'emergent' strategy – the plan captures and supports the direction set by e.g. operational choices, opportunism, chance combinations of decisions...A lot of successful strategy starts 'unconsciously' or by guerrilla activity at lower organisational levels
- Possible to have successful strategy without an explicit strategic plan

Why do 'strategic planning'?

1. Corporate requirement
2. As a communications instrument (symbolic value)
3. It is 'best practice' to have a strategic plan
4. Improve performance
5. Achieve goals
6. To be more competitive
7. To survive as a service

Some potential benefits

- Conversation with staff and other stakeholders as to
 - direction
 - what works well, what works less well
 - competitive situation
 - opportunities and threats
- New knowledge (sharing), ideas, analysis
- Writing stories (scenarios) about the future captures and stimulates thinking, but also is a great way to communicate future value to stakeholders
- Opportunity to stretch and to reform the service
- Getting people on board for the changes that are needed
- Motivation, focus, energy – sense of common purpose
- Opportunity to communicate more strategic sense of the service to key stakeholders

Process more important than the plan?

- Having a strategy is critical, a supporting plan is (usually) a bonus
- Effective strategy depends on accurate knowledge, clarity, focus and (everyday) implementation of priorities – you need a team effort to develop it and to make it happen on a daily basis
- Team understanding and commitment to direction and priorities can be the main goal of the process
- People who understand ‘why’ are more effective than those who are only aware of a specific ‘what’ to do
- No plan survives intact for long in real life – but direction and priorities support intelligent adaptation and strategic opportunism
- The written ‘plan’ may have dangers and be outside your control, but you should try to keep the process and the agreed strategy clean
- Process can also increase understanding and commitment of all stakeholders, if you can involve them

Priorities are key to strategy implementation

- What gets real priority in your organisation?
 - ‘Urgent’ – but is it important?
 - Routine, work as always done
 - ‘Enjoyable’ or perceived ‘higher status’ work
 - Interests of direct personal clients rather than those of key stakeholders
 - What staff decide in their daily work – difficult to estimate & control input to some library/research tasks
 - Client satisfaction, ‘best practice’ and professional standards substitute for understanding of **value**
 - Thousands of everyday (non)decisions can overwhelm and bypass any formal strategy

Strategy is also what you choose not to do

<p>Right things, Right <i>The ideal state</i></p>	<p>Wrong things, Right <i>Good results but lacking in value</i> <i>Wasted resources but unpopular to change</i></p>
<p>Right things, Wrong <i>Good choice of activity, invest in improving performance</i></p>	<p>Wrong things, Wrong <i>Poor results and even bigger waste to invest in improving performance</i></p>

- Professional success can be strategically misleading
- Effort wasted in improving performance in low value activities
- Switching effort & cutting back established activities **requires a team buy-in on strategy**
- Buy-in on strategy plus stretch can help reallocate effort
- ‘Right things, right’ does not guarantee instant and clear success

Intended effects of strategic approach

- Effort to understand and deliver **value**
- Stakeholder interests reflected (alignment with organisation-wide priorities; aim at requirements of Members & parliamentary work, not just client demand)
- ‘Not urgent’ **but important** gets higher priority
 - Resources for some traditional/routine work might get stretched
- Investment in longer-term/larger impact
- Mitigation
 - Disruptive ‘urgent’ work might reduce with strategic anticipation and with focus on higher value results
 - Staff can manage workload by reducing effort for less important work; elimination of least important

Strategy is fundamentally about **value**

- Focus on understanding what value means in your institution and the value you offer compared to the competition
- In parliaments, value has no fixed definition and is not measurable: value is determined by Members
- What is value for a Member? High-quality information is not, in and of itself, valuable to a Member
- Value attaches to something contributing to **their success** e.g.
 - a) Their impact in parliament
 - b) Making best use of their limited time
 - c) Their ability to engage with civil society
 - d) Keeping themselves informed and up-to-date
 - e) Running an effective & efficient private office
- How does your service support those (or other) aspects of success?; do Members know that?; and how can you increase the (perceived) value?

Thank you!

Some additional notes are in the following slides

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Ideas for team involvement in strategy

- Presentations, discussions of the strategic context; circulate strategic papers from the wider organisation or professional groups; provide access to service data and analysis of performance; external visits and conferences for middle & lower level staff; visits and presentations by other services and experts
- Individual interviews – what stops you doing a better job, how could your job be more interesting or worthwhile? how do you think the service should develop?
- First part of a SWOT analysis works well as a group activity
 - brainstorming in smaller groups
 - presentations of the results
 - Edit & simplify the lists, then collective voting exercise to identify most important issues
- Collective exercises to define the mission and vision
- Ask for presentations on strategic issues from project teams or mid-level managers
- Circulate draft strategy papers for comment & revision
- **Year-round activity, not an away-day**
- You won't get exactly the strategy you want – cut and wait, re-run the arguments or take a 'brave' decision?

Ideas for team involvement in the plan

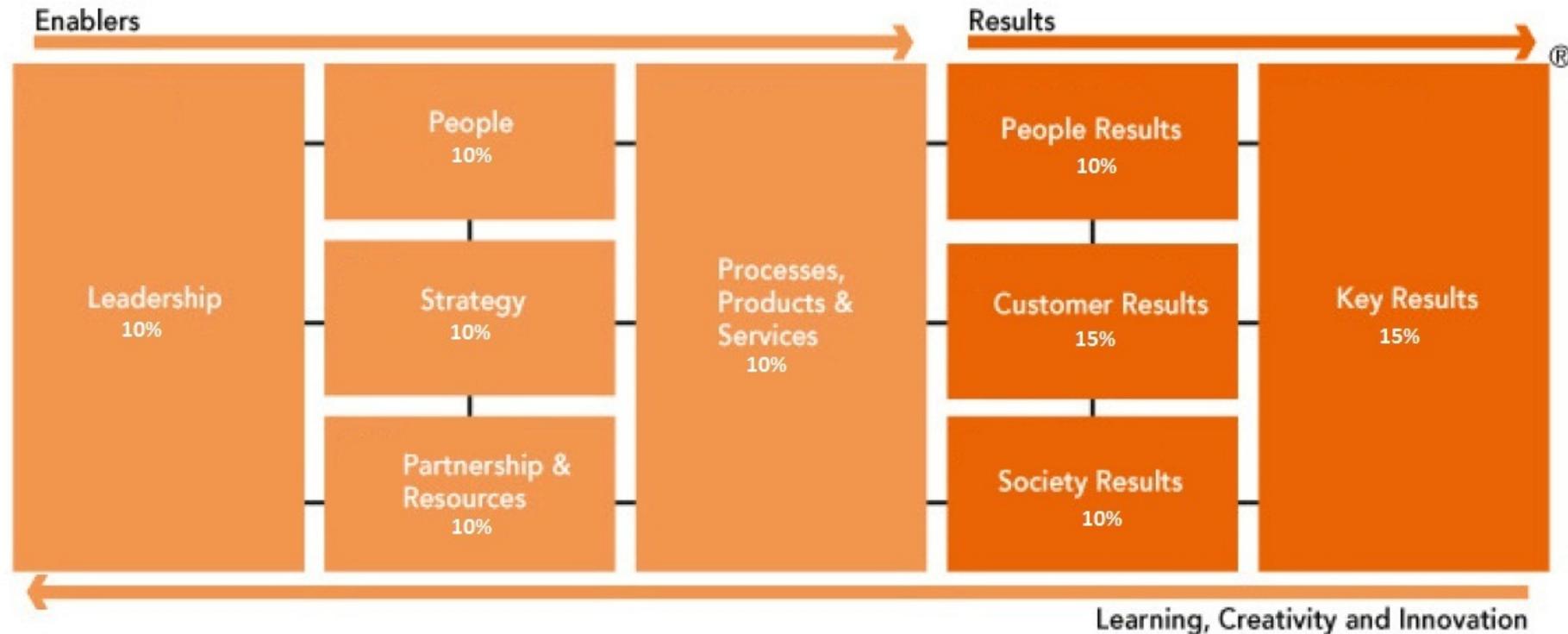
- Collective/decentralised approach to defining objectives and measures within the agreed strategic framework
- Use 'Work Programme' approach to include regular work of all staff, rather than just focus on new projects
- Linkage of team and individual targets to strategic plan objectives
- Regular reviews of progress, reporting of results, analysis for and by the team
- Changes of plan according to results and team feedback
- Celebration of achievements!
- Success is owned by the team and by the responsible team members, failure is owned by the chief (especially in communications outside unit)

'Strategy execution'

- The *fashion* for 'strategic planning' faded in the 1980's and 1990's
- Almost all large organisations still have some form of strategic plan
- The current fashion in strategy is for a focus on 'strategy execution' – based on the realisation that lots of beautiful strategies and plans were being lost through inattention to the detail of making them happen (See e.g. 'Executing your strategy' Mark Morgan, Raymond R. Levitt & William Malek, Harvard Business School Press, 2007)
- **Project management** is a key tool in effective execution, but make it 'light' - avoid excess bureaucracy
- **Change management** methods should be studied and applied

Strategic planning in context

- Strategic planning is not a magic solution – part of a wider effort. Even a systematic approach e.g. as modelled by EFQM (below)



Some dangers in 'strategic planning'

- Plans that drop from the sky
- Holding consultative processes to discuss strategic ideas for a plan, with no follow-up in the content of the plan (or no plan)
- Publishing plans which do not lead to (perceptible) action
- Plans always adding new activities but silent on existing activities
- Plans without resources
- Objectives without credibility even at launch
- No follow-up, no check or review of planned actions – or none until the reporting period is ended
- Checks and reviews, but no change of plan even when not working, or new circumstances
- *If any of the above is imposed requirement, try to limit damage; and pursue real strategy locally*

Some ideas for reading/follow up

- *Harvard Business Review* online – some free content. Specific topic page: <https://hbr.org/topic/strategic-planning>
- Association for Strategic Planning (US-based) <http://www.strategyassociation.org/>
 - Report on study of use of strategic planning by non-profit organisations, possibly confusing a correlation with a cause: http://c.ymcdn.com/sites/www.strategyassociation.org/resource/resmgr/Docs/SP_P_ractices_in_High_Perform.pdf
- Strategic Planning Society (UK-based): <http://www.sps.org.uk/>
 - (But has now put its content behind a pay-wall)
 - Linked-In Group: <https://www.linkedin.com/groups/1862382>
- *Strategic planning and management for library managers*, Joseph R. Matthews, Libraries Unlimited, 2005

Plan templates

- ‘Free’ plan templates online – usually private-sector oriented, and provided as a way of selling software etc.
- Many public institutions publish their strategic plans.
 - Interesting example - for the structure & presentation, not particularly the content - British Library
 - Strategy 2011-15 setting out the context and the thinking:
<http://www.bl.uk/aboutus/stratpolprog/strategy1115/strategy1115.pdf>
 - Broken down into annual Action Plans e.g. 2012-13
http://www.bl.uk/aboutus/stratpolprog/strategy1115/actionplan2012_13.pdf
 - NB these are used for public communications and internally there would probably be more specific and measurable targets. And the plan to 2015 is still online in 2017, with no update!

One summary of
'strategic planning'

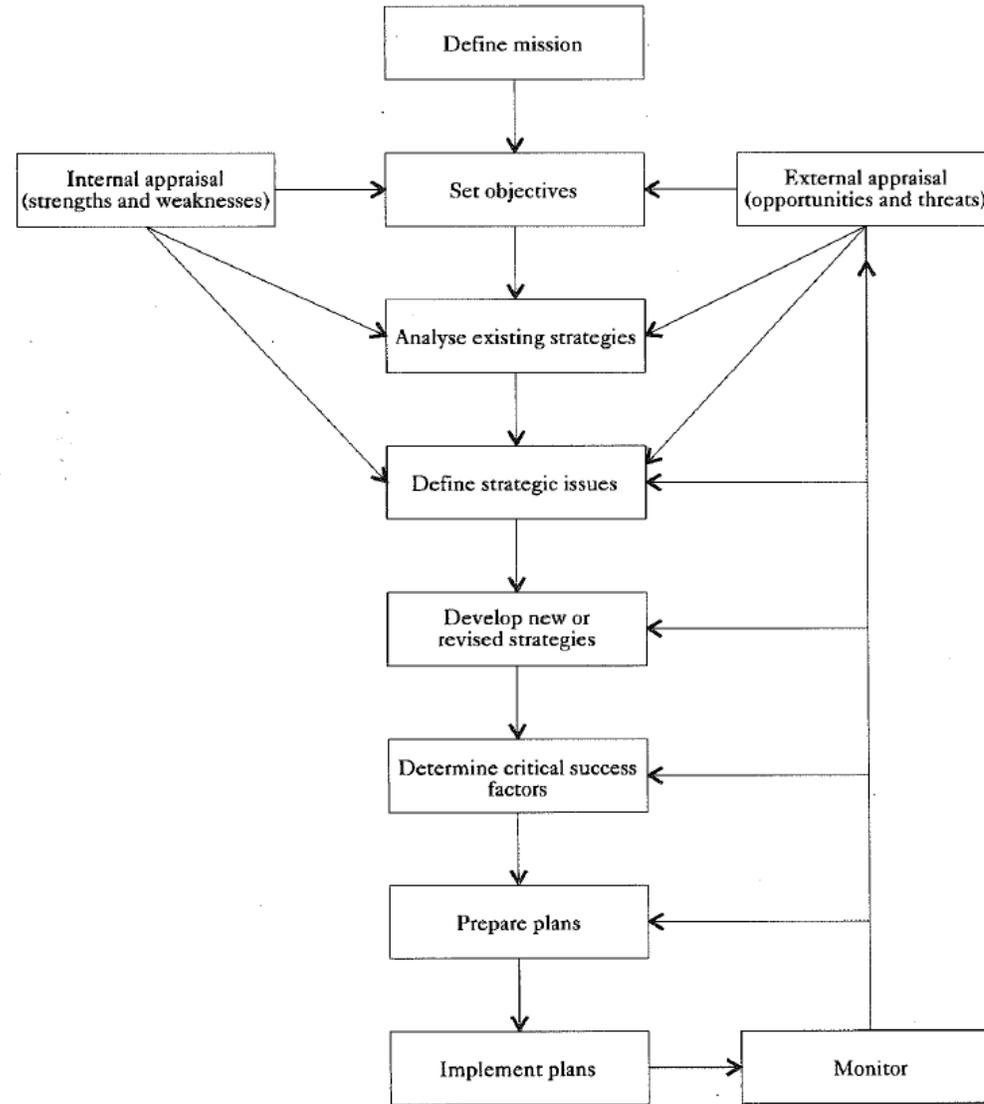


Figure 2.2 Strategic planning

Michael Armstrong, *A handbook of management techniques*, 2nd edition, Kogan Page, London 1993. p. 28