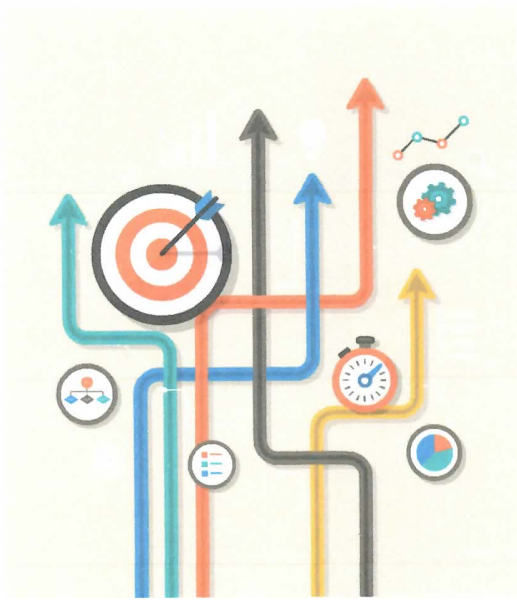


Executing the Strategic Plan: **Five Actions Midlevel Leaders Can Take**

BY DANIEL JENSEN, PhD



Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it, as defined by John M. Bryson in Strategic Planning for Public and Nonprofit Organizations (John Wiley & Sons, 2011).

In short, a strategic plan should be the driving force for actions at all levels of an organization.

The strategic-planning effort consists of much more than conducting an annual offsite meeting to determine an organizational philosophy (such as vision, mission, values, core competencies, and priorities). If the strategic plan is properly executed, it will help create a way of thinking, acting, and learning that is necessary to achieve organizational success. Without strategic planning, an organization may continuously react to near-term issues, but employees will not understand why their work is important. Strategic planning links and synchronizes actions at all levels of the organization, resulting in leaders and followers who understand where they are heading and why their day-to-day actions matter. Because resources usually are limited, strategic planning must occur to ensure that resources are not expended unnecessarily due to a lack of strategic and operational focus.

Sometimes, however, even if a strategic plan exists, the actions and organizational focus at all levels are never synchronized. Unfortunately, in some organizations, an offsite strategic planning meeting is viewed as an intrusion on day-to-day priorities and tasks—a “check the box” activity that does not translate into actionable objectives and tasks. The strategic plan is often dismissed as esoteric and the responsibility only of senior leaders, not of people in mid- and lower-level leadership positions. Consequently, the strategic plan is never put into action.

Although senior leaders may be responsible for developing the strategic plan, it is the responsibility of midlevel leaders to translate this strategy into operational-level plans and actions that will result in execution throughout the organization. Without midlevel leadership buy-in and emphasis, the strategic plan cannot be put into action throughout the organization.

Following are five fundamental actions that midlevel leaders can take to execute the strategic plan:

SUPPORTING GOALS AND OBJECTIVES: FIXING RESPONSIBILITY

The organizational philosophy is the foundation of the strategic plan, but strategic goals with supporting objectives must be developed. Goals describe a future condition that the organization needs to attain to achieve its vision. Objectives are statements of what must be done to achieve a goal. Effective objectives are specific, measurable, achievable, realistic, and timely (SMART).

As goals and supporting objectives are developed, identifying which individual or organization is primarily responsible for their achievement is important, as is identifying the other individuals or organizations needed to help accomplish the objectives. To develop action plans, determine who has the primary responsibility and who has the secondary responsibility in achieving the goals and objectives.

DETAILED ACTION PLANNING: WHERE THE RUBBER MEETS THE ROAD

Each objective should have an action plan. An action plan describes the specific tasks that are necessary to achieve the supported objective. This level of planning is where the rubber meets the road. Ultimately, it determines whether the objectives, goals, and organizational vision are achieved. Action plans detail the milestones, activities, time frames, resources, and team members required to achieve an objective.

Leaders should develop action plans in a manner that best meets the needs of those involved in executing the plans. Anything from butcher paper and markers to software programs can be used in the development process.

MEASUREMENTS: UNDERSTANDING PROGRESS

Measuring specific tasks is necessary to understand progress against expected results. Measures are a standard used to evaluate and communicate performance. They should be developed to give leaders a current view of the progress made in achieving the organization's goals, objectives, and action plans. Mark Graham Brown, in *Keeping Score: Using the Right Metrics to Drive World-Class Performance* (Productivity Press, 2006), offers the following suggestions on how to approach organizational measurement:

- ▶ Measurement should focus on the vital few key variables rather than the trivial many
- ▶ Measures should be linked to the factors needed for success—the key business drivers
- ▶ Measures should be a mix of past, present, and future to ensure that the organization is concerned with all three perspectives
- ▶ Measures should be based around the needs of customers, shareholders, and other key stakeholders
- ▶ Measures should start at the top and flow down to all levels of employees in the organization
- ▶ Multiple indices can be combined into a single index to give a better overall assessment of performance

- ▶ Measures need to have targets or goals established that are based on research rather than arbitrary numbers
- ▶ Measures should be changed or at least adjusted as the environment and your strategy changes

ENVIRONMENTAL SCANNING: ASSESSING OPPORTUNITIES AND THREATS

A strategic plan is a living document. Changes and updates to the plan are driven by the strategic environment, those factors outside the organization that are potential opportunities or threats. The strategic environment must be scanned and assessed to make appropriate adjustments to the strategic plan.

One way to undertake this scan is with a strengths, weaknesses, opportunities, and threats (SWOT) analysis. The SWOT analysis is a methodology used by many organizations to determine the strengths and weaknesses that are inherent to the organization (internal focus) and the opportunities and threats that are outside the organization (external focus). Strengths and weaknesses are normally focused on the present state of the organization, while opportunities and threats are future-oriented. To identify internal strengths and weaknesses, the organization must monitor resources, strategies, and performance. Monitoring external forces—the political, economic, social, educational, technological, informational, and environmental trends—can help identify opportunities and threats. The leaders of an organization must dedicate the appropriate resources to properly scanning and assessing the strategic environment.

LEADERSHIP EMPHASIS: A STRATEGIC-PLANNING IMPERATIVE

Employees pay attention to what is important to the boss. For the strategic plan to be effectively executed, it must be a top priority of leadership at all levels. Leaders can emphasize the importance of the strategic plan's execution in a number of ways:

- ▶ Meet with subordinate leadership to explain your intent and expectations
- ▶ Display posters in work areas showing the organizational philosophy
- ▶ Post the strategic plan on the organization's home page
- ▶ Promote the strategic plan on social media
- ▶ Address the strategic plan during media events and visits to subordinate organizations
- ▶ Develop and present supporting plans
- ▶ Host "town-hall meetings" to express the significance of the strategic plan
- ▶ Evaluate employees based on the accomplishment of strategic-planning products (goals, objectives, action plans, and metrics)

A strategic plan provides the framework for an organization to prioritize and synchronize organizational and individual actions in order to achieve the goals and vision. However, having a plan is not enough. Midlevel leaders, supported by senior leadership, must accept execution responsibilities for the strategic plan by developing goals and objectives, creating and implementing actions plans, measuring progress, scanning the environment, and providing leadership emphasis. Leadership, particularly midlevel leadership, is the foundation of success. *MW*

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