



Successful Strategic Planning With a Baby Boomer Focus

By Anne Schroeder

We all know how to plan: We plan vacations, office retirement parties, weddings, and other milestone events. Yet as business owners, managers, and employees, we frequently find it unsettling to engage in strategic planning for the organization's vital future. Procrastination sets in when we are confronted with the daunting task of forecasting opportunities that are, at best, only speculative. We're more at ease in the comfort zone of now.

Feeling nervous and uncomfortable is part of the process for successful planning. Seemingly opposite gut feelings often serve as effective reminders that we're moving in the right direction. If we always play it safe, we may miss real opportunities that wait around the corner for those willing to experiment and to try something different in the course of long-range planning. Being introspective means recognizing and juggling the plusses and minuses of your organization's health.

Ambiguity aside, there is at least one absolute certainty. Baby Boomers are reaching retirement age at the rate of 8,000 to 10,000 per day, according to AARP¹ and Pew Research Center,² respectively. Workers in this demographic in many cases are CEOs,

managers, and other key decision makers in the building envelope industry today. They may be top engineers, waterproofing experts, highly competent architects, and seasoned forensic investigators. In the absence of immediate, structured succession planning, your organization stands to lose a significant source of talent, skills, and

continuity. The baton needs to be passed to well-prepared, competent performers who hit the ground running.

With such compelling numbers, jumping into the planning and organizing cycle is imperative. Combining strategic planning and succession planning is a necessity, and the two are mutually beneficial partners for



Facilitator recording participants' ideas.

envisioning the future. Staffing is always a component in mapping out the next three to five years; however, the steps involved in succession planning require additional questions, training, and dedicated follow-through.

GETTING STARTED

It's been said that more jet fuel is necessary to propel a spacecraft past the drag of earth's atmosphere than is needed for orbiting the planet and the rest of the journey back. So it is with strategic planning, as it can seem like an overwhelming project. Here's a way to make things easier.

Divide the process into five achievable task groups: collect the backstory, create the future story, construct the strategy, communicate the plan, and coordinate the implementation.

COLLECT THE BACKSTORY

Pull together a picture of current happenings and relevant past history by dipping into your archives and querying long-time employees prior to selecting and meeting with a planning team. Most important is that the leadership team analyzes customer needs, wants, and concerns. Make a simple pro/con list of what's worked and what still needs to be addressed.

Reevaluate the talent base in your organization by listing all the skills available in your workforce. This item is critical in

light of merging a succession plan with the final strategic plan so as to determine what competency gaps exist now, or may exist through attrition, in delivering needed services in the future. Collect retirement data and/or best guesses of retirement plans for those who have yet to commit.

Another vital area is to pinpoint what your strongest competitors do, and then when it comes time to strategize, explore how to do things differently. Also examine the macro environment by researching overall global and national trends, as well as the most current developments in the building envelope industry, and current relationships with regulatory agencies.

The resulting information should be documented in easy-to-read bulleted lists that serve as touch points for next steps in the process. Distribute these facts and ideas prior to any group meeting.

CREATE THE FUTURE STORY

Select a planning cadre of no more than five to seven key players and bring them up to speed on previous research and data from the leadership team. More support from this group can be garnered by promising an interesting, educational, day-and-a-half process, and by situating the planning forum off site. Having a neutral facilitator to guide the process allows everyone to be heard equally while monopolizers are diplomatically harnessed.

Time away from the office can be minimized by beginning early in the evening after the workday and concluding late afternoon of the next day, preferably beginning on a Thursday or Friday to leave a break before the following Monday. The evening conversation can focus on the backstory with the understanding that any new, supporting data will be added and compiled. Another critical aspect deals with personal and organizational values espoused by the leadership team. There are numerous easy-to-administer values assessments on the market that can jumpstart this discussion.³

While the Strengths, Weaknesses, Opportunities, and Threats (SWOT) technique has been a useful approach for decades, we prefer a technique used by Disney University called storyboarding. Storyboarding was pioneered in the 1930s at the Walt Disney studios in the early days of animated feature films. It's a highly visual, participative, low-tech method for gathering and codifying an impressively large number of ideas in less than two hours. From our experience, this can be done with groups as small as three and as large as 125 participants.

In the trade, this technique is called a "graphic organizer," which, when used along with a structured planning sequence, builds group consensus in subtle, incremental stages. A well-stated springboard question provides the motivation for small-group, blue-sky thinking. One that we've found successful is: "If [name of organization] were doing the best job possible in 2018/2020, what would need to be in place?"

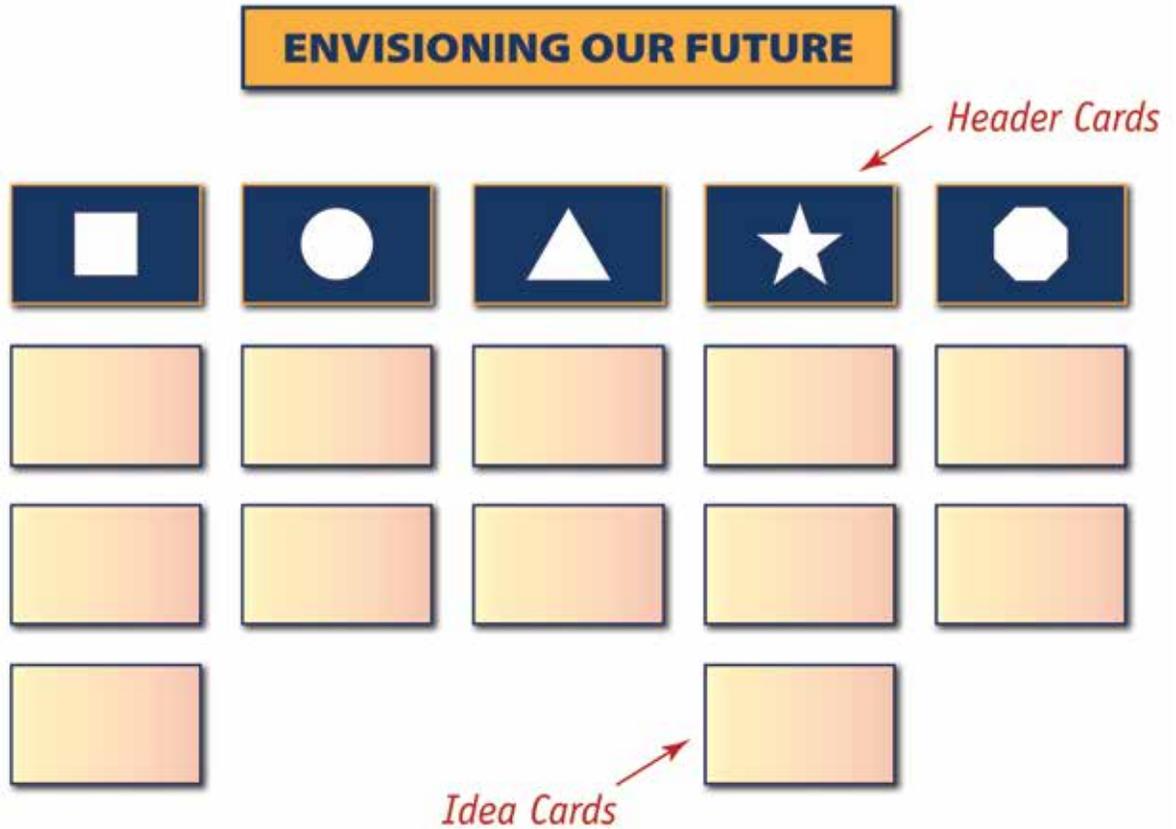
Initially, each individual in small groups of three to five people responds to the question by listing as many ideas as possible. The facilitator can stimulate ideas by mentioning words such as "staffing," "services," "facilities," "technology," "marketing," and the like.

The groups receive ten 5 x 8 index cards and a dark-colored felt marker and are instructed to discuss all ideas and then reach consensus on the top ten. Each idea is to be written in headline form (four to six words) on a separate index card. After 20 minutes, the groups are told to examine their ten cards and to select the top three priorities and label them #1, #2, and #3.



Facilitator creating the storyboard.

The facilitator collects the #1 priority cards from each group; and then, one by one, he or she posts them on a blank wall under symbolic placeholder 5 x 8 cards. These placeholder cards will later be named based on the way in which the idea cards are categorized. Symbols (such as a square, circle, triangle, rectangle, number sign, asterisk, and so on) can serve as the placeholders. Continue until the first three priorities are posted. Naming the columns may have begun. The rest of the idea cards are then affixed to the wall by group members in these and soon-to-be named columns.



An example of a graphic organizer.

Cards can be moved to the most appropriate column based on group discussion.

The column headers with their titles most often equate to two- to three-year goals, the idea cards become short-term objectives, and vision and mission statements can be crafted based on the storyboard information and other data brought to the session.

Vision statements are usually short, containing no more than two sentences and emphasize the ideal future for the organization. The mission statement is longer, conveys what the organization is currently doing, and answers these questions: “What” is our purpose, “how” we go about accomplishing our purpose, and “why” we are involved in this business.

CONSTRUCT THE STRATEGY

All the raw material has now been produced from the storyboard and from the pre-forum research. The column headers and idea cards are distributed in categories to the table groups. Each table group develops clear, crisp goal statements followed by secondary objectives that can be accomplished in two to six months.

Action plans accompany every objective and spell out the well-known reporter’s ques-

tions: *what* specific steps to take, *who* is in charge and who assists, *when* to begin each step and when it should be completed, and *how* it will be done. The “how” must include budget considerations and other needed resources. This action planning sequence provides ample time to reexamine and re-prioritize objectives as assets are calculated.

The team responsible for exploring the staffing issues will do so with succession planning in mind. The members need a worksheet listing the main phases of succession planning. For example, an initial focus is to name the professional competencies required to conduct business two to five years in the future. Competencies predict how well an employee will perform based on agreed-upon standards. Universally acceptable competencies are the ability to collaborate, to influence others, to self-manage, to use data for effective decision-making, to integrate personal and organizational values, to demonstrate top-level technical skills, etc.

Next is a discussion on any gaps that may exist between current talent and that which will be needed in the not-too-distant future. Gaps can be determined based on competency analysis assessments, again available commercially or as free guides on

the Internet.⁴

Developing a timeline for implementing the goals and objectives is a final step before adjourning. A helpful tool is a Next Steps Chart, similar to action plans for each objective. The facilitator can ask, “So what do you do on Monday to further this process?” Again, it’s a chart with what steps to take, who will do them, and by when. Often these elements involve such tasks as undertaking additional research, communicating the plan to other staff, confirming budget and revenue predictions, and appointing a writing team to polish the vision and mission statements and to incorporate new information as it is supplied.

All goals, objectives, and action plans are to be discussed at various intervals during the day to ensure that every idea is incorporated. The rallying cry at the end of the full-day session should be that a first draft of all major components has been completed! This step-by-step approach packs a great deal into approximately nine to ten hours for the planning team.

COMMUNICATE THE STRATEGY

“The sooner the better” is the motto for sharing planning forum results. Most organizations filter it through full staff meetings

