

Innovation *insights*

OFFICE OF PLANNING AND
Institutional Assessment

Innovation Insight Series Number 21
<http://www.psu.edu/president/pia/innovation/>

Implementing a Strategic Plan

One of the most challenging aspects of strategic planning is implementing the plan – getting what’s on paper to come to life and achieving the goals and strategies included in the plan. Work for successful implementation of a plan needs to begin when work on the plan begins, and continue through the implementation.

While developing the strategic plan

Communicate: Organizational communication about the plan and the planning process needs to start as soon as the planning process is determined. While you won’t be able to share a detailed planning process right at the start, you will be able to let people know the reasons why the organization is beginning the process to develop a plan, how the plan will be used within the organization, and what the impact of having a longer-term plan will be on the organization.

Engage: Include all or representative groups of constituents within and outside the organization during the planning process. Get their input. There are many ways to do this - face to face town meetings or focus groups, surveys, task forces on specific issues or topics, or involving a large group in the actual drafting of the plan. The best fit will be determined by the culture and size of the organization.

Align: An effective plan cannot be developed in a vacuum. Be aware of trends in your field, the environment you work in, and the direction of any larger organization your unit belongs to. Ensure the resulting strategies and goals of your plan are aligned with any higher level organizational goals.

Once the strategic plan is written

Keep it moving: Get senior leadership visibly

behind the plan. Have them share with the organization the information they receive in progress reports. Demonstrate that the organization is supportive of implementing the plan and keeping it from becoming a shelf document.

Communicate: Share the plan within and outside of the organization. Use multiple formats, adapted to the audience - the Web, brief brochures, and detailed action plans. Update the information to reflect progress and accomplishments.

Engage people: Implementing strategies is a lot of work – it’s implementing change. Engaging more people will make it possible to spread the workload. Those people engaged in the implementation will feel more ownership for the plan and the changes that result.

Set priorities: All of the goals and strategies in the plan cannot be implemented and accomplished at the same time. Spread activities out over the life of the plan. Review the strategies and determine the best places to start. This may be influenced by opportunities for quick successes, by a logical ordering of strategies that depend on actions completed in earlier strategies, or by an annual cycle of organizational activities. A matrix that shows when each strategy will be started and how long it will take to complete may be a useful attachment to the plan.

Have a point person or leader for each goal or initiative: One designated point of contact for an initiative will make it easier to share information, monitor the status, and coordinate work across all components of the plan.

Identify measures: Measures and clear expectations make it possible to see how you are doing, what progress you've made on a strategy, what successes you have had, and when you have accomplished a goal. The plan should be data informed, not data driven - data is a means to an end, not an end in itself.

Link the plan to daily activities: Keep the plan visible by integrating it into regular activities such as staff meetings and professional development plans. Drill down from strategies to show how they are related to daily activities.

Set milestones within the plan: Like project management, develop action plans for individual initiatives within the plan. Determine who is responsible for what, when it will be started and completed, and what intermediate accomplishments are needed to achieve final results. This will help to determine when adjustments need to be made and make progress more apparent.

Have an easy way to track and summarize progress: Being able to recognize even partial accomplishments and progress can be rewarding and motivating. But keep resources focused on implementing the initiatives, not on tracking progress.

Recognize accomplishments: Recognizing what has been done can generate energy to do more. Don't wait until a project or plan is completed to recognize and celebrate. Recognize past accomplishments, and recognize milestones during the implementation of an initiative.

Learn from the past: Plans are not written in stone. As you implement your plan or initiatives, monitor trends and the environment. Track the implementation approaches that work well and which need refinement, and then adapt future implementation

approaches.

Remember that strategic planning is not about producing a plan; it's about leadership engaging others to achieve the organization's vision. Planning falls short when the course is charted, the direction set and nothing more happens. Strategic planning is a process that includes charting a direction, determining the course, and reaching a destination. You need a plan for implementing goals and strategies in addition to identifying them, in order to reach your destination.

References

Dooris, Michael J., Kelley, John M., and Trainer, James F., Eds. *Successful Strategic Planning*, New Directions in Institutional Research, #123, Fall 2004.

"Seven Key Points for Successful Planning" *Quality Endeavors* #115, December 2008 <http://www.psu.edu/president/pia/newsletter/news0115.html>

"Implementing Your Strategic Plan" *Quality Advocates*, October 1, 2008 <http://www.psu.edu/president/pia/advocates/2008/10/01/index.html>

"Best Practices in Implementing Strategic Plans" *Quality Advocates*, November 11, 2005 <http://www.psu.edu/president/pia/advocates/2005/11/index.htm>

For more information, contact the Office of Planning and Institutional Assessment at 814-863-8721 or psupia@psu.edu, or visit our Web site: <http://www.psu.edu/president/pia>.

The services of the Office of Planning and Institutional Assessment are provided free of charge to The Pennsylvania State University and are adapted to the specific needs of departments or individuals.

May 2009