

## Talent Development 29 Strategic Planning

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Section 3.4 in the CPTD Certification program for ATD is Talent Strategy and Management. Section C reads, “Skill in designing and implementing strategic plans for talent development projects, programs, and/or functions.”

In this brief article, I will share my favorite strategic planning tools and how to use them wisely.

### Start with the basics

Strategic planning has common elements that, if followed well, will result in robust plans that drive the organization forward toward its goals. As Stephen R. Covey wrote: “Begin with the end in mind.”

### Create a Vision

The first action is to create a vision of the desired future state. Understand the broad developmental needs of the specific group and craft a statement of what it will look and feel like when the desired state is achieved. It is a statement of **where** we are going. This uplifting view of the future will add energy for the remainder of the program.

### Clarify the Purpose and Mission

We are going to do a lot of work to accomplish the vision. The purpose statement clarifies **why** we are doing the work. Many people confuse the purpose statement with the mission. They are different concepts. Mission is **what** we are doing currently.

Let me share an example of the difference between mission and purpose. If we were operating a quarry, we might have a mission to cut large rocks into manageable slabs. Our purpose might be to build a cathedral.

### Identify the Values

The values become the underlying assumptions upon which we design the work. Values are extremely important to get right, because they tell us the rightness of our direction and actions. We hold everyone accountable for modeling all of the values, all of the time. For leaders, the values help you the most when it is inconvenient, expensive, or difficult to follow them.

### **Develop a List of Agreed-upon Behaviors**

This step is often omitted, and it is a mistake to do so. Behaviors tell us **how** we are going to treat each other. We hold each other accountable for following the agreed-upon behaviors daily.

### **Do a SWOT Analysis**

Before diving into the actual strategy creation, it is always important to do an environmental scan of ourselves and our environment. We do this by assessing ourselves (strengths and weaknesses), like looking through a **microscope** at our own capabilities. Then we examine the environment in which our organization works (opportunities and threats), like looking through a **telescope** at the rest of the world.

With the above steps in place, you are now in a position to brainstorm the critical few **strategies** that can take you from your current state and get to the vision.

### **Develop the Strategies**

As you contemplate the drivers to move you in the direction of the vision it is important to keep things focused. I recommend that four to six strategies is a good number to keep things focused. More than six strategies at one time will actually start to diffuse the effort and reduce your chances of success. The genius behind developing a strategy is to **focus** effort on the critical few things that must be done well.

### **Identify Tactics**

The tactics become the specific actions required to accomplish the strategies. You identify **who** will be doing **what** by **when**. You think about the resources needed to accomplish your development strategies as you think through the tactics.

### **Document Measures and Goals**

In order to track progress against the strategic plan, it is important to figure out how you are going to measure progress and what the team wants to present for the goals of the effort.

### **Obtain Buy-In**

This critical step must be emphasized by leaders. It is a leadership function to ensure that everyone on the team not only understands the wisdom of the strategy, but is also inspired and committed to make sure the goals are reached.

## **Conclusion**

For any developmental effort, it is necessary to do some serious planning to be sure the effort has a pathway to success. If a plan is missing some of the elements described above, there is a probably that the program will not reach the goals.

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