

How Project Managers Can Save the Strategic Planning Process

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It's a dog-eat-dog world out there. Organizations are quickly learning to juggle agility with corporate responsibility. Large enterprises and small businesses alike are taking insurmountable hits because of their inability to adapt to rapidly changing technology and business practices. The changing faces of the data management and IT fields are excellent examples. Many organizations are tackling these challenges by abandoning their strategic, long-term objectives for quick fixes and short-sighted survival tactics. This feverish pace of work has rendered the traditionally slow and cumbersome strategic planning process irrelevant. Strategic planning consultants are looking down a double-barreled shotgun: one barrel shows decreasing demand for their services; the other barrel shows their rates plummeting.

But strategic plans themselves are not to blame. They remain a critical path to guiding an organization intelligently into the future. There's a growing gap, however, between creating a strategic plan and implementing it. Failure to build a bridge between the strategic planning and project management planning processes is a major reason strategic plans don't work. When strategic planners and project managers work together from the beginning, strategic plans become more relevant, operational, realistic and implementable. At that point, they are transformed into one of the most useful tools for weathering tough economic times and staying ahead in today's business world.

Where Good Strategic Plans Go Wrong

Too many strategic plans cost a lot of money and merely collect dust. Why? Because there is a disconnect between the people creating the plan and the people who are relied upon to implement it. Strategic planners often fail to rely on the help of professional project managers - those who can better ensure that it is easily transformed into a working, successful operational plan approach.

This disconnect between the development and completion results in huge cost overruns, delays in implementation, chaos in the workplace and low worker morale. And, ultimately, it can lead to an organization's inability to achieve the vision that was painted in the strategic plan. The plan becomes unrealistic and unachievable.

What makes the project manager's participation so important from the beginning? Strategic planners have figured out how to take into account all views of the various stakeholders, how to include financial projections for each activity, how to set proper goals and objectives and even set timelines, milestones and target dates. However, the reason strategic plans are not "functional" is that they are created by a person or team who is neither a knowledgeable, certified or experienced project manager. Not naming a project manager to the team who understands the reality of managing complex projects is the single largest failure of the strategic planning industry.

Flying at the Same Altitude

The project management industry must flex its growing muscle to get into and become effective at the strategic planning stage. Many CEOs resist this idea because they continue to think of the strategic planning stage as being "earlier" than the project management stage. Bringing project managers on from the beginning may appear to be a waste of time and resources, but it's really quite the opposite.

To truly picture the difference between strategic planners and project managers, think of it this way: strategic planners are broad thinkers who soar at 30,000 feet. Project management professionals often work in the trenches, managing details and day-to-day nuances. They deal with the personnel, scheduling and IT issues that can push an unrealistic plan horribly off track, little by little. By putting strategic planners and project managers together to work on the processes, they begin to fly at the same altitude. They can see what the other sees and can plan accordingly.

In other words, I am suggesting that the wall between strategy and tactics come down like the Berlin Wall. After the wall fell, there were still East and West Germans; but they had much greater opportunities to collaborate and share their expertise and culture with the other to the betterment of their unified country.

Some authors have suggested the term strategic management for this improved process. And it's a term that seems appropriate because it allows for a cross-functional and all-inclusive component that traditional strategic planning processes lacks. While strategic planning is somewhat one-sided, strategic management brings together strategic planners and project managers with great success whether they are at GE, DARPA or Harvard University.

Upgrading to Strategic Management

We know that the best CEOs fly at both 30,000 feet and near the ground simultaneously. They create vision and strategy, and they require successful implementation. They do their job best when they are both a strategic planner and a project manager.

Frank Lloyd Wright's genius was that he was not only an immensely creative designer and architect; he was also a skilled electrical engineer, mechanical engineer and materials/physics expert. The students he trained at Taliesin and Taliesin West had to go out and fetch the rocks and other natural materials they would use in their building projects. They had to do their own wiring. They had to learn deeply about the goals, traits and character of the people and organizations for whom they were designing buildings. By knowing how to develop an architectural plan, they were performing the role of a strategic planner. By developing the specifications for the materials, furniture, uses of the space, interior designs, budgets, tasks, lighting and the exact relationship of the building with the physical environment and the users of the building, Wright and his students took on the role of a project management professional.

This is the beauty of strategic management. The key is to consider every point of view, from the people leading the charge to the people doing the heavy lifting - and giving each role a voice in the process.

Thinking Outside the Binder

Imagine you've done everything right, yet you're left with a 200-page binder housing your company's new strategic plan. Now what? How are you going to use it, and how are you going to reference the information when you need it? When Lyndon B. Johnson was president, he demanded that

anything written for his eyes be no longer than one page. Perhaps LJB was on to something. While no valuable strategic plan can - or should - be that brief, there are ways to make it much easier to follow. This format for a strategic plan must incorporate the knowledge that attention spans are getting shorter and shorter.

Goals, objectives, implementation guidelines, budgets and personnel assignments are all crucial parts of a strategic plan. But lumping them together into a big, fat binder is not the best way to ensure a plan is followed. Take advantage of new presentation formats to make your plans readable, understandable, credible and actionable. That could mean PowerPoint slides, Visio drawings, spreadsheets or other new graphical/text combinations that integrate project management templates with strategic planning templates. The goal must be to make strategic plans implementable, not just readable.

Whatever format strategic plans take in the future, they will certainly not look like the 200-page plans of the past. Project management professionals can go a long way to making this a reality by communicating the plan the way the organization's employees communicate, not the way executives and consultants want them to be communicated.

Getting it Right From the Start

Whether it's a single data management project or large-scale business process change, bringing project managers on board at the planning stage is not difficult once everyone agrees it's worth doing. However, an evolutionary process may need to take place in order for the strategic planning industry to embrace this thinking. Project managers will need to develop the political skills necessary to succeed as an intruder in the unfamiliar territory of strategic planning. At the same time, strategic planners will need to convince senior management of the need to add people with project management skills to the strategic planning team. In spite of a recent wave of books about improving the integration of strategic plans, this issue is still not "topic A" at meetings of strategic planners. An abundance of 10-pound strategic plans are still collecting dust in the American business and nonprofit landscape.

When done successfully, the worlds of strategic planning and project management can combine to produce strategic plans that guide organizations rather than collect dust. And as more project managers successfully become involved earlier and earlier in the strategic planning process, strategic plans will become a more relevant and realistic part of business.

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