

Facilitating Business Planning



ABOUT THE AUTHOR

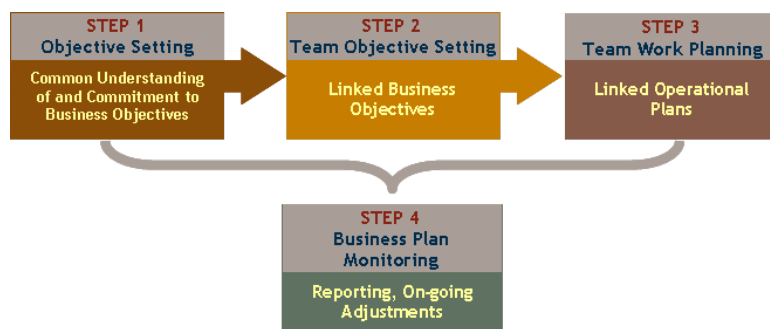
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Solid, workable, and realizable business plans depend on staff participation and cooperation throughout the planning process.

The cornerstones of the annual planning process proposed in this paper are inclusion, participation, explicit understanding of the business goals, ownership, and accountability. A solid, workable, and realizable business plan, which leads to real and substantial accomplishments, depends on staff participation and cooperation throughout the planning process. Staff knowledge and support are two of the critical success factors for the planning process, and through this involvement, staff develop a true feeling of accountability and ownership.

The role played by senior leadership in setting the mandate for subsequent staff involvement is equally important. The leader must carefully consider the organizational business requirements, as well as her/his personal objectives, that will move the organization toward the attainment of its vision.

The essence of effective strategic planning is sacrifice. Leaders must make difficult choices to ensure that energy and focus are carefully rationed. Senior leaders must establish and communicate key objectives and supportive rationale. Once the mandate is established, senior leaders must engage the management team in translating these into specific initiatives and action plans.



With the foregoing in mind, the proposed planning process aims to arrive at common understanding and involve management and other key staff during the major steps. To ensure full understanding of and adherence to the business objectives, senior leaders must participate at key stages.

The four major steps involved in the planning process are illustrated at left:

The planning process starts with the establishment of objectives. This first step identifies the short list of objectives that will move the organization forward in three main areas:

- ⊖ Organizational Business Requirements;
- ⊖ Objectives that, once achieved, will move the organization closer to realizing its desired future (the Vision);
- ⊖ Operational requirements required to advance the organization's continuous improvement program in its key areas: leadership and planning, process, performance management and people.

In Step 2, Objective Setting, each of the teams uses the commonly understood business objectives to establish the specific objectives that they will commit to achieving in the coming year. In Step 3, Work Planning, the teams identify the tasks, milestones and resources required to meet their specific business objectives. Step 4, Monitoring, is the final and on-going step of the planning process. This step sends a clear message to managers and staff to stay focused on the organization's objectives and deliver results.