

Implementation and Tracking Strategic Planning I Part 2

A strategic plan that you have to dust off, does not advance your business.



In last month's article, we created a strategic plan. This plan is not a new year's resolution to be ignored in a month. This plan needs to be implemented, maintained and updated. But there are a lot of strategies and tactics. Where to begin?

Start at the Beginning

As Desmond Tutu once said, "there is only one way to eat an elephant: a bite at a time." The strategic plan is the elephant and each tactic will consist of bites. The bites are the actions taken to complete the tactic.

The tactic owner should break out the action steps needed to achieve the tactic in the designated timeframe. Why the tactic owner and not the shop owner/strategic plan owner? Because the tactic owner will have the expertise to know what it will take to achieve the tactic.

Each action step should have its own deadline. Consider creating a team to help implement the tactic. If the tactic has a numerical goal to it (for example, 36 new customers), then it can be broken down into action items (three new customers per month). Once the necessary people and timeframe are in place, start taking bites: step one, then two and so on.

Tracking

The strategic plan needs to be tracked by the plan owner to provide accountability and status. It also needs to be accessible to others so that the tactic owners are able to update the status of the tactics. Here are a few of the available options:

Microsoft Excel/spreadsheet. The plan can be listed on one tab or make each tab a goal or a strategy. There are a variety of ways to set it up. Make sure to include the deadline and a place for the tactic owner to update the status.

Microsoft Planner/Trello. Project management software can be populated with the plan, owners and

TACTIC: Find ERP System

Research and find system to best fit current processes.
Owner: Shop owner | Deadline: 6 months (by June 30th)*

Put together a team.
Deadline: 2 weeks (by March 30th)*

Get recommendations from PMPA ListServe Community and contact PMPA Technical members who sell ERP systems.
Deadline: 1 month* (by Jan 30th)*

Choose at least three options and setup demos.
Deadline: 3 months (by March 30th)*


Negotiate contract with chosen supplier.
Deadline: 5 months (by May 30th)*

Sign contract.
Deadline: 6 months (by June 30th)*

*Use actual dates

deadlines assigned, and the updates can be entered in the comments, which would then be sent to anyone assigned to that task.

Strategic planning software. There are several software options specifically for strategic planning that allow for assignments, reminders and reporting.

When do the tactics get updated? That's up to the owner of the strategic plan (usually the shop owner or chief of operations). The timing of the updates should correlate with the tactic action items. There could be a routine time such as quarterly or the first of the month. They could also be specific to the tactic. There is a delicate balance between the need for updates and overwhelming the tactic owner with too many update deadlines. 

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