

Business Planning Intensive

In this program, we are going to focus on how to undertake planning in a way that brings about transformative change.

This is a skill you can use when you are working with a Board, senior leaders and staff within your organisation, external stakeholders, or funders.

What We Will Be Talking About In Session 1

- The big picture of this Business Planning Intensive;
- Why getting momentum for change is important;
- The four types of strategic positioning of business groups;
- How you want your group or another group to change;
- How to move from a problem focus to a visionary New World;

The Big Picture

This Business Planning Intensive is designed to introduce you to ways of thinking that increase your influence in bringing about change. We will do deep dives to explore theoretical frameworks that help you make important strategic decisions. We will be talking about both tasks and relationships, since both have a critical impact on transformation. We will introduce you to tools which streamline these processes and you will be able to apply them in your real world.

Conversations about the challenges you face are an important part of the program. We encourage you to be open about these challenges. One of the comforts is finding that many of these challenges are shared across the group. One of the other experiences is learning from the insights of other participants as well as Bryan and myself as program facilitators. We ask participants to treat these open conversations as confidential to the group.

This is the rhythm of the program:

Week One: Creating momentum for change, working out how groups are currently positioned, and how you want that to change, moving from a problem focus to clarity about the change needed.

Week Two: Winning hearts and minds, structuring planning to engage key players, drawing out strategic issues which need to be resolved, and creating high quality plans swiftly. Analysing stakeholder relationships,

bringing power and the quality of relationships into the top of your mind, working out how you want relationships to change.

Week Three: Making strategic decisions about what you are going to deliver, insightful frameworks which provide shortcuts for decision-making, and tools which streamline getting the framework of your plan right. All of these will be practised in your real world.

Week Four: How to use the power of AI as an integral part of your planning, how to avoid the pitfalls of AI powered planning, the art of prompt engineering, practising in your real world.

Momentum for Change

One of the challenges in planning is the sheer familiarity of the experience. Most professionals have been part of planning for many years: very few have experienced transformative change flowing from those planning projects.

One of the other challenges in planning is the weight of familiarity with the current world. People can get caught up with their understanding of current limitations, and without intending to do so, that thinking can limit their future.

Last year we worked with an NGO where their funding had been stable, and inadequate, for 30 years. We developed a Strategic Vision for the future which was not limited by current funding, and a Business Plan which was highly specific about what was going to be delivered within the areas that were funded. The group used their Strategic Vision to seek new funding, and within three months they secured a three-times increase! That is the power of transformative planning.

Start with a Question

I always start any planning project with a simple question.

I ask this question of the most senior person in the group, either the CEO or a business leader. I ask this question of board members or committees of management. I ask this question in conversations with staff.

The question is this:

Do you want to use this planning project to Transform or Maintain current approaches?

I've never known a CEO or group of staff choose *Maintain*. People invariably go for transformation, even when it doesn't seem like a natural choice for that individual.

But something special happens as a result of asking the question. It creates more space for bold choices, new strategies, and importantly, a sense of excitement about the planning project.

It is vital at this point not to specify the change or how it will be achieved. That would be inappropriately limiting.

Strategic Positioning

Almost every organisation or business group has a plan, whether you call it a corporate plan, strategic plan or business plan.

Unfortunately, many groups complete their planning without dealing with their core challenges, whether they are inadequate funding, poor performance or strained relationships with key players.

The risk is that these problems become dealt with through loss of funding, lowered expectations or lost opportunities to make a difference.

So, what we going to be dealing with in this first session of the Intensive, represents an opportunity to shift positioning and bring about powerful change.

There are four potential ways a group can currently be positioned:

- Black Hole
- Implementer
- Contributor
- Strategic Leader

You can use this way of thinking about positioning in relation to your own group or other groups that you interact with - it is a useful shorthand that I work with every day as part of my first understandings in a planning project.

The reason that these positionings are useful is that each one represents a potential pathway of change and also a way of communicating about the group with others.

Things you may notice that will help you work out who and what you are dealing with:

Black Hole

- Delays in core processes. Missed deadlines.
- Inaccurate work.
- Reluctant to take responsibility for quality or timeliness.
- Says “No” rather than “Yes”.
- Creates unnecessary hoops that people have to jump through.
- Doesn’t explore the fundamental needs of those they work with.
- Unreliable, doesn’t meet agreed commitments.
- Complains or creates a fuss when asked to do fairly ordinary things.
- Take up more and more resources whilst not delivering commensurate results or value.
- Undermines individuals and groups.

Implementer

- Reliable, meets commitments.
- Core work undertaken at the quality and time required.
- Pleasant to engage with.
- Works well with others.
- Gives required reports and information to others, without fuss.
- Output commensurate with resourcing.

Contributor

- Gets the core work done, AND ...
- Builds the capacity of their own group.
- Builds the knowledge skills and capacity of other individuals and groups.
- Helps build commitment to change initiatives.
- Shares resources with other individuals and groups.
- Active in planning discussions and review of performance.
- Helps others to better understand and feel heard.

Strategic Leader

- Gets the core work done, AND ...
- Successfully implements strategic changes.
- Pilots and rolls out innovative approaches to developing people and improving core service delivery.
- Force for good in group interactions.
- Helps build the positioning of the agency, as well as their own core function.
- Models moving around resources, including dropping activities that are not delivering value or working well.

I was once running a workshop within an organisation and the CEO had previously attended this program on a public basis. At this point in the program she asked if she could come up to the front and sit next to me. I said “Sure!”, intrigued to see what would happen next.

She sat in front of the group and said that she thought they were a black hole and she was a major contributor to that.

You could have heard a pin drop. I have never heard a CEO be so truthful and vulnerable with a group. Here is the truth. In my view, she was correct on both counts.

I invited her to specify further how she saw the group as being a black hole. She talked about delays, ways of interacting with external people and groups, delays in getting new strategic approaches to the board, barriers between groups, a reluctance to take responsibility for their own decisions, sending things up to her as CEO which they really could decide themselves.

I invited the group to respond. They dived in, as open and prepared to go there as she was. They talked about micromanagement, slow decision-making, piles of files on her desk, and a fear of getting it wrong leading to caution rather than boldness.

It was an extraordinary conversation to be part of, let alone facilitate. A complete privilege.

Everyone committed to change and became clear about the nature of the change. They implemented all agreements and embarked upon a strategic process that made them a powerhouse in their industry.

This brave CEO became the best senior leader I have ever worked with and brought about strategic changes that are still a stretch for many organisations.

I led their planning for 15 years and each year we dealt with different issues.

That is the mark of excellent planning - the issues you dealt with last year were nailed. This year you have different issues to deal with - that's what you're looking for – different issues each year because your planning works.

In this reading I introduced you to the key concepts we're covering in the Business Planning intensive. We have explored a useful preliminary question to ask before undertaking planning, and I have introduced you to a way of thinking about strategic positioning that provides a shortcut to understand your group and other groups. We will be applying these ways of thinking in the program sessions.

Bryan and I look forward to working with you in the program.

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