



**Traditional Strategic Planning
and
Adaptive Action Planning**

In today's fast-paced, unpredictable world, it's difficult to think about long-range planning with any real sense of efficacy. Think about those groups and organizations that finished a strategic planning process in the late summer or early fall of 2008. After October of that fall, chances are their worlds changed so dramatically that their plans had little meaning for them, beyond a reminder of what they had thought was possible.

It is true that we must think about the future. It is also true that direction and goals contribute significantly coherence across a system. The difficulty comes when we begin to think we can predict the future well enough to develop a long-range plan, based on a snapshot of where we are today.

Human Systems Dynamics (HSD) introduces new ways to think about and do planning for the future. In this new paradigm, Strategic Planning is replaced with Adaptive Action Planning. The following table summarizes some of the fundamental ways in which HSD-based Adaptive Action Planning is different from traditional models of Strategic Planning.

| Traditional Strategic Planning | Adaptive Action Planning |
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| Assumes long-range future is knowable, so you can set reliable long-term objectives and control the environment sufficiently to meet them. | Assumes that the future is unpredictable, so you must work effectively with the circumstances that surround you. |
| Focuses on setting goals that will pull an organization into the desired future. | Focuses on defining actions that push the organization to live within its desired future. |
| Divides goals, objectives, roles, and responsibilities into discrete organizational areas. | Focuses on individual and group actions toward common goals. |
| Works in quarterly or annual cycles to plan the path for the coming year, set expectations, and evaluate performance and communication. | Works in multiple cycles of planning and evaluation that are as frequent as feasible to encourage adaptive change in response to the shifting environment. |
| Focuses on major threats, shifts, or transformations of the whole organization at the same time. | Focuses on individual and small-group actions that make a difference in the "here and now" with an eye toward the preferred future. |
| Produces long lists of goals and objectives that are more or less aligned toward a common goal. | Produces a focused action plan for influencing one aspect of the system at a time. This single change begins a cascading process that ripples change across the organization. |
| Driven by insights and needs of leaders who believe that they see the desired future for the organization. | Reflects the insights and knowledge of the professionals and service-delivery personnel who work in the system every day. |
| Selects a single set of measures for success of the organization as a whole. | Helps individuals and groups establish and track the measures that are significant to their work. |
| Establishes a singular description of the current state, desired state, gaps, and strategies to close gaps. | Incorporates diverse perspectives and strategies that encourage on going learning through continuous improvement in all parts of the organization. |
| Assumes that the forces and influences on the organization will remain stable in the foreseeable future. | Assumes that the environment inside and outside the organization will evolve continually in the near- and far-term futures. |
| Establishes priorities. | Articulates actions required to accomplish priorities. |

Essentially, Adaptive Action Planning consists of three steps.

1. **What?** In this stage, you gather data to understand what is happening in your world. How are people affected? What is the current performance on certain measures? How do people spend their time? What do your customers think?
2. **So What?** In this stage you make meaning of the data you have collected. What are the patterns in the data? What really shapes those patterns? What are the conditions that currently exist in the system and what do they mean to overall and individual functioning? What does the data say about the gap between where you are and where you want to be? What does this data mean to us in the short term? In the longer term? Across our constituencies? What does this say to us we should do? What strategies would be effective to move us forward?
3. **Now What?** This final stage asks us to carry out strategies for closing the gap between the current and desired states and watching for the impact of our actions. What conditions do we need to establish to move forward? What actions can we take to create new patterns of interaction, performance, and decision making?

At this point, once you have taken your steps, you are back at the **What?** stage, asking what difference did your actions make and are you ready for the next step or do you have to backtrack to change your approach to bring about a greater shift?

Adaptive Action Planning is cyclical in its continuous path from gathering data, making meaning, and formulating and carrying out strategy. It is also iterative in that whatever changes occur in one cycle have an impact on the data you collect, what those data mean in your system, and the steps you take in your next strategy.

The attached graphic offers a quick map for remembering these simple steps for moving forward, even as your organization responds and adapts to the day-to-day challenges and changes inherent in today's environment. Try using it. We think you will find it a helpful and simple tool as you you're your ongoing challenges and opportunities.

In the mean time, be in touch. Maybe there are ways we can work together to move toward more effective, adaptive planning.



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