

## STRATEGIC VISIONING & PLANNING

**Strategic Visioning is not strategic planning.**

***Strategic Visioning is purposefully suspending linear thought to intentionally travel outside of the comfortable known, in order to design a future, which is exponentially greater than a slow plod towards the inevitable from existing data points.<sup>1</sup>***

**Strategic Visioning requires:**

- A. A completely open perspective and a willingness to imagine the as yet created.
- B. A willingness to suspend logical, safe, and easy next steps towards, “Well, we’re already set up to do this” in exchange for a dauntless “AND.”
- C. Recognition that we have the opportunity to invest in learning everything we can about what can reasonably be anticipated to occur and determine how to maximize our contribution, while also leveraging it to create the greatest possible impact for our customers or members.
- D. Significant advance effort on the part of participants to study unrelated and yet tangentially relevant future materials, research and data from our existing audiences’ knowledge and preferences, and the foresight to project a reasonable pace at which they will progress towards and through the next change shifts.
- E. Boldness to dream beyond “D” and decide whether to create something completely new to which we can reasonably expect our audiences will be attracted if they had the opportunity to experience, use, or implement our identified new solutions.

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<sup>1</sup> Cynthia Spraker Mills, FASAE, CAE, CMC, CPC, CCRC

## Strategic Planning

***Strategic planning is the exercise of deciding the most important outcomes that will enliven a strategic vision and creating actions to tactically execute in order to arrive at the next iteration of the future.<sup>2</sup>***

Strategic Planning requires:

- A. A clear understanding and agreement upon the outcomes that are to be sought (not the methods by which they are achieved.)
- B. Agreement on what is not appropriate in achieving the outcomes (ethics, legality, appearances, conflicts, bribery, damage to members or customers, PR implications)
- C. A realistic assessment of existing resources, and identification of those that could reasonably be created, in order to support the future intentions of the plan.
- D. Decisions regarding what can be ceased or redirected that are no longer in alignment with the outcome priorities and/or absorb resources for less important outcomes.
- E. Clear communication to both the parties that will execute the plan and the parties that will be affected by the plan's implementation.
- F. A compelling outcome that creates momentum towards change that is significant for those impacted (customers).
- G. External research on variables impacting the profession/industry.
- H. Internal research on customer data and usage that provides immediate and future clues to their preferences.
- I. Dedicated leadership through a process that begins in a moment in time and yet requires dynamic oversight and participation at all phases of the next evolution.

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- J. Infrastructure to support a plan's implementation and implementation success.
- K. Commitment by the designers and the implementers for the long-haul.
- L. Succession Planning to transfer commitment and understanding

**Consider the following as you begin your strategic work:**

Are you, & if so, how are you, being impacted by...?:

VARIABLE	IMPACT....
Exponential Change	
Enhanced Complexity	
Quantum Speed	
Shorter Response Time	
Agile Company/Work Environment	
Generational Differences	
Technology: Employees' Adaptation	
Technology: Customers' Expectations	
Customers' Overall Expectations	

<b>Competition</b>	
<b>Global Impact</b>	
<b>Overwhelmed Employees</b>	

<b>Is Your Focus.....?</b>	<b>As Exemplified By.....</b>
<b>Mission-Centric/Cause-Oriented/Meaning Matters</b>	
<b>Multi-Customer</b>	
<b>Bottom line/Stockholder-Driven</b>	

<b>Before You Create and Design:</b>	
<b>What definitive and relevant research has been conducted to date?</b>	
<b>Have the right questions been asked of the right people? Provide examples.</b>	

<p><b>Do we have big data infrastructure for ongoing research and analysis, both tools and people?</b></p>	
<p><b>Who is driving a new design, and what is their agenda?</b></p>	
<p><b>What evidence is there to support change, and why do we want to change?</b></p>	
<p><b>Are we approaching the future linearly or exponentially? Provide examples.</b></p>	
<p><b>Have we identified your concentric circles of influence? Who are they?</b></p>	
<p><b>Is our culture in alignment with the next phase? Demonstrate how.</b></p>	
<p><b>Do we have the resources to support your efforts at each phase? Address how: Financially? Volunteers? Employees? Operationally?</b></p>	
<p><b>Do we have the buy-in from all audiences? This is evidenced by.....</b></p>	

<p><b>Is our team ready for implementation? Demonstrated by.....</b></p>	
<p><b>Do/will millenials want to work for us? Why?</b></p>	
<p><b>Do Xers want to work for us? Why?</b></p>	
<p><b>What impact will Boomer retirements have on our business?</b></p>	
<p><b>Do we have a succession plan at all levels?</b></p>	
<p><b>Have we added a community-based facet to our company to attract and retain millenials?</b></p>	
<p><b>What portion of our operation can take advantage of virtual employees globally?</b></p>	
<p><b>Are we flexible and nimble in case we're right and have to scale up faster?</b></p>	

<p><b>Are we flexible and nimble in case you're wrong and have to redirect quickly?</b></p>	
<p><b>Is our technology and overall infrastructure ready to support the next phase with appropriate processes?</b></p>	
<p><b>Have we completed financial projections if nothing was to change at all?</b></p>	
<p><b>Have we completed financial projections for each scenario we are designing?</b></p>	