



## Strategic Planning Best Practices

### Addressing common disconnects

We often ask business leaders if they have a strategic plan. Can you guess the answer? "Of course we do!" And they usually *do* have a high-level idea of where the organization is going. We find there are typically **three disconnects** however that keeps companies from getting the results they desire:

**1. The strategy is so high level** that most employees can not make the connection to what they can or should be doing to help get there. Special projects are driven by a handful of go-to leaders without engaging the energy of the entire organization.

#### **Best Practice:**

Having too few involved in strategic planning is a common problem, but having too many people trying to agree on and determine the course for a company does not work either. Use your top leaders to determine *what* the strategy is going to be, and then engage the rest of the employees in figuring out *how* to get there. This allows everyone to engage in the process and invites new ideas, while limiting the decision-making to a manageable group of leaders.

**2. The strategy is focused on internal problems** that need to be fixed or addressed. Customers *expect* companies to have systems and teams that work well and may not even be aware of internal issues - or improvements.

#### **Best Practice:**

Strategic positioning should consider how your organization is viewed by the external world and how to leverage what makes you unique. This may lead to identifying a need to fix internal systems or provide new training, but fixing something just because it is broken does not make it a strategy.

**3. The strategy is defined solely as financial goals**, with no logical programs to invest in the systems, technology or people that will create those results.

#### **Best Practice:**

In order to provide new and different products or services there are likely changes in the infrastructure that will be required to support the customer needs. To make the changes work, employees will likely need new skills, competencies or knowledge. Planning through to the specific changes in your processes and technologies and the people that operate them will improve your chances of achieving the financial goals.

**The Illuminary Group is expert at facilitating strategic planning  
for business leaders based in Oregon.**

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