

# Frequently Asked Questions: Strategy

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***Be pro-active in managing your strategy.  
Don't let your strategy manage you.***

## **Can strategy be taught?**

Yes. There are several different methodologies for approaching strategic planning and implementation (delivery) as well as strategy management. If you are interested in learning about strategy, I would suggest that you shadow someone who facilitates strategy discussions. There are also several organizations that teach about strategy online and you can begin capturing your own methods and approach by practicing.

## **Can strategy be learned?**

You bet! If you are interested in learning more about how strategy can help define the organization and help reach the goals identified, you should study strategy. In my strategic planning work with clients, I always share an [overview of the process](#), how the effort will unfold, expectations for various activities all to teach the client how they can support the strategy internally. That will raise the level of success and help the organization achieve their defined goals.

## **What is the definition of strategy?**

There are several definitions that can be found in research materials and with various consulting firms. The definition I use is a “high-level plan that is developed with the intent of achieving one or more goals identified by the organization.”

## **How can strategy be implemented?**

Lack of a strategy implementation plan, or delivery plan, is one of the most common reasons why strategies fail. I believe that strategy efforts have several smaller stages and roll into 3 main phases: planning (design) + implementation (delivery) + management (sustainability). Strategic planning answers the “What?” question and the question for the implementation phase is “How?” How will we reach these goals? How will we be communicating the strategy to the employees and stakeholders? How will we be tracking and monitoring our progress? How will we know when we have met the goals? Implementation, or delivery, is often overlooked. Many organizations spend most of their time focusing on the “What?” question and spend very little time, if any, on the “How?” question. Which is why this scenario is sometimes referred to as “bridging the gap”. The gap between strategy design and strategy delivery. Project management is a key component to a successful strategy implementation. Project management practice and strategy dovetail to provide a comprehensive strategy experience to the individuals and organization.

## **What are the top 5 challenges with strategic planning?**

Based on my observations, the top 5 challenges I have seen include the following:

1. Designing a strategy and never delivering on the strategy
2. The strategy is too aggressive
3. The strategy is too ambivalent
4. The strategy is not inclusive
5. The strategy has no support internally

### **What are the stages of strategy development?**

I see the strategy experience as having 6 stages:

- Initiation
- Planning
- Execution
- Evaluation
- Closing
- Management.

Which then roll up into 3 main phases:

- Planning (design)
- Implementation (delivery)
- Management (sustainability).

As indicated on this [process map](#) that I use with my small business clients.

### **Why is strategy important?**

If the strategy process has been well communicated, is inclusive and clearly defines the roadmap that the organization wants to take to help it get that much closer to their vision...it can be very important. Creating a roadmap that includes contributions from the entire organization, developing a dedicated communication plan, identifying colleagues who are responsible for various aspects of the strategy (distributed ownership) are all important steps that will enable the organization to work together to achieve their goals. For real. Everyone will be rowing in the same direction and because the leadership team has included the employees in the building of the strategy, the level of commitment from those employees just rose several notches. Everyone will be collaborating to work toward the same goals. This is what a strategy can do for a company.

### **Why is project management so important to strategy management?**

Project management and strategy management dovetail. There is a statistic that 9/10 organizations never meet their strategic goals. Why? Because most organizations spend a lot of time on the design of the strategy and very little, if any, time on the delivery of the strategy. Having a strategic plan is great! But if you don't act on it...why have it at all? Action is all about delivery, implementation, and execution. That is project management in a nutshell. Strategy + project management = success. The strategic initiatives answer the question "How will we achieve this strategic goal?" Initiatives = Projects. Therefore, without project management practices, the organization will be unable to achieve all their strategic goals.

### **How can we prepare for strategic planning activities?**

Preparation for strategic planning activities is critical! I always suggest that my clients prepare for these activities by asking some insightful questions, of themselves, in anticipation of the strategic planning activities. About the current state of the organization.

- How are we doing with our existing strategic plan?
- If you have missed any of your strategic goals, do you know why? What could the organization do differently to achieve those goals? Are those goals still relevant? Are they meaningful? Do they add value to the organization, employees, customers, or community?
- What do your employees think? What does your membership or volunteer base think of the existing strategy?
- If you don't have a strategic plan, why are you looking to build one now? What do you feel are the benefits to having a strategy?

A thorough and comprehensive strategic planning session will include participants that are prepared for the discussion. By asking these questions, of yourself, prior to the planning session, you will be able to provide insights into the current state of the strategy which will prove to be incredibly valuable to the kick-off of the overall activity.

### **What is a strategic plan?**

A strategic plan is your roadmap for the organization. All organizations should have a vision of where they want the organization to go. The mission of the organization is what they do, day in and day out to get the job done. And the strategic goals will help define that roadmap with milestones along the way that will help the organization get that much closer to their vision. A strategic plan will include the vision, the mission, the strategic goals, and the initiatives.

### **What does execution of the strategy mean?**

This refers to the “delivery” or the “implementation” of the strategy. The strategic planning process results in a strategic plan. But that plan needs to be delivered. Why spend all that time and effort creating a plan and then do nothing with it? You need to act on it. Execute it. Deliver it. Implement it. All these terms refer to acting on the plan and getting it done.

### **How many strategic goals are appropriate for our business?**

That depends on several factors. The most important factor in my opinion is how large your organization is and if you have staff dedicated to work on the strategy. Most organizations ask their employees to take on various strategy roles and responsibilities. Yet, we need to keep in mind that these employees also have “day jobs”. One of the most common challenges I have observed is that organizations are far too aggressive with their strategic plans and have dozens of strategic goals! Who is going to work on these strategic goals to make sure that they come to fruition? This is not a situation that is set up for success. Being too aggressive with your strategy will result in frustration, disappointment and, ultimately, complete disregard for the entire strategy for being too onerous. Start small, with meaningful and insightful strategic goals. Build a momentum for the process and engage the entire organization to help achieve those goals. Here is a visual of a [strategic plan format](#) for a small business.

### **What is a strategic initiative and why is it important?**

A strategic initiative is the answer to “how will we achieve this strategic goal?” For instance, if you have a strategic goal to expand your sales territory into the next county with 10 new customers by 2Q22, the next question would be “how?” How do you plan to get 10 new customers in the next county by 2Q22? Some examples of initiatives might include:

- Developing a new marketing campaign specifically for that county

- Joining a business association that includes that county and scheduling a presentation that is open to the public
- Increasing visibility in that county through sponsorship at community events
- Donations to various organizations
- Volunteering for some of the community events.

These are all examples of initiatives and can help answer the question “How are we going to achieve this goal?”

### **Who is involved in the development of a strategy?**

Everyone. I believe that everyone in an organization should have the opportunity to contribute to the strategy. Although it is usually the leadership team that solidifies the strategic goals with the help of a strategic planner, the entire organization should be given the opportunity to contribute to that plan. This can be easily accomplished by providing a means for the employees, volunteers, membership, or community to provide insights on the question of “how?” How will we achieve these strategic goals? What a great way to get some creative responses, good information and, most importantly, commitment!

### **Who is involved in the Implementation of a strategy?**

Everyone. Everyone should be involved in the success of an organizational strategy. If you don’t know how your role and responsibilities are contributing to the strategy, ask.

### **What are the Roles and Responsibilities for a strategy effort?**

The topic of roles and responsibilities is often overlooked. It is overlooked in strategy management as well as project management. I strongly encourage you to look at the [roles and responsibilities document](#) that I designed for my clients. Use this as a foundation for your organization and modify it as needed. Most importantly, share it! Discuss it! Encourage employees to ask questions and comment on it. Everyone wants to contribute. Just make sure that they have the information they need to be successful in making those contributions.

### **What is meant by “sustainable” strategy?**

A sustainable strategy refers to one in which the organization can uphold, manage, and maintain. One of the most common challenges that I have observed is an overly ambitious strategic plan that was designed by the leadership team and includes numerous strategic goals. Yet the leadership team did not consider who was going to do the work required to achieve those goals. Someone needs to shoulder the work required to achieve the goals identified in the strategic plan. Who will that be? It usually falls to the employees who will then be expected to juggle the strategy work along with their “day jobs.” Who will be maintaining the strategy? Reporting out on the metrics of the strategy? A strategy requires care and feeding...who will be doing that in your organization? Being sustainable will allow the organization to effectively incorporate the strategy into the culture through various means which will ensure success in achieving the strategic goals. Everyone wants the organization to succeed and it’s important that the employees succeed as well.

### **How is strategy formed?**

The process that I use for small businesses and non-profit organizations includes some pre-work for the participants of the planning session, then the planning session where the pre-work

contributes to the discussions on the status of the organization today. At the planning session(s) the vision, mission, and the strategic goals will be determined. My process deviates from other processes at this point. I like to include all employees or members on the decision as to “how” the organization will achieve these strategic goals. The employees and members may be closer to the ideal and can contribute meaningful and valuable recommendations for initiatives and “how” to meet the goals. The entire strategic plan will be formed with inputs from all these sources. The desired outcome will be to have a strategy that is meaningful, appropriate, sustainable, and realistic. Here is a visual depiction of this process.

### **How can a strategy be monitored?**

Once the strategy has been designed, the next phase of the lifecycle is delivery, or implementation. The delivery focuses on the strategic initiative and the work that needs to be completed to achieve the goals identified. Monitoring the initiatives can be complex and onerous if the organization has not assigned owners to the various tasks and roles. I have observed organizations that have not assigned the monitoring role to an individual, therefore, “no one” is responsible. And “no one” monitors the strategy. My recommendation is that a Strategy Coordinator be assigned to monitor, maintain, and manage the strategy.

### **How will a strategy be maintained?**

Good question! Is your organization prepared to maintain the strategy? The lifecycle of the strategy formation begins with design, moves into delivery, and then transitions to management. Once the strategy moves into the management phase it will need constant care and feeding. It is not a static artifact. It will be constantly changing based on the work being completed for the initiatives and other efforts. Again, I would suggest that the organization identify a Strategy Coordinator to ensure that the strategy is monitored and maintained appropriately.

### **How will the strategy be measured?**

The strategy should be designed in a way to enable measurement. For instance, someone recently mentioned to me that they had a strategic goal of *“Increase membership engagement”*.

- What does that mean?
- What is the baseline?
- How is “engagement” defined?
- How would you measure this?
- What does an “increase” look like?

Here is a better idea for a strategic goal that addresses this need:

*“Increase membership engagement by recruiting 10 new volunteers to the committee by the end of 2Q22.”*

- Can you measure this? Easily.
- Does everyone know what it means to get a “new volunteer”? Sure.
- Do you know what the baseline is? Doesn’t matter because you’re just looking for 10 new volunteers.
- Is this strategic goal measurable? You bet!

The wording of my recommended goal meets the **S.M.A.R.T. criteria**: Specific, Measurable, Achievable, Relevant and Timebound. If you stick with the S.M.A.R.T. criteria, you will have no problems measuring your strategy.

**What metrics can you use to measure the strategy?**

The metrics of your strategy will depend on the strategic goals. For instance, if you have a strategic goal to “Recruit 10 new volunteers by 2Q22” then your metric would be the # of volunteers. If your goal was “Increase sales by 5% in the neighboring county by 2Q22” then your metric would be sales in that county.

**How often should the strategy be reviewed?**

I recommend a comprehensive review of the strategy on a quarterly basis. However, I also suggest that strategy becomes an active topic in team meetings, on project teams, All Hands meetings and other communication channels available. A sustainable strategy includes incorporating the strategy elements into the culture of the organization. All employees, volunteers and members need to have the information available about the strategy and how the organization is progressing with that strategy. Keep communicating. Again. Again. Again.

**Who will be responsible for reviewing the strategy?** Usually, the leadership team is responsible for the comprehensive review of the strategy on a quarterly basis. The Board of Directors may also be interested in getting an overview of the progress as well. However, I would strongly encourage the Strategy Coordinator, or whoever you have assigned to monitor the strategy also be included in these sessions. As a matter of fact, the Strategy Coordinator should be facilitating the session. Reviewing the strategy on a daily, weekly, and monthly basis should be part of all team discussions.

### **Why to some strategies fail?**

Many strategies fail. As a matter of fact, 9/10 organizations do not meet their strategic goals.

Why? It could be several factors:

- \*Overly aggressive strategy
- \*All design and no delivery
- \*Changing priorities
- \*The design did not align well with the culture
- \*Lack of involvement from the people who would be working on the strategy
- \*Lack of support from leadership
- \*Limited project management skills to get the job done
- \*No effective transition to strategy management
- \*Inadequate metrics and measures – cannot effectively measure the strategy

### **Why is the strategy design so critical?**

The design of the organizational strategy is critical because it needs to align with the culture of the organization. Many organizations just complete a strategy because they are required to, and it might not be a good fit for the people who will be supporting that strategy. By designing a meaningful, sustainable, and realistic strategy everyone wins!

### **Why is strategy implementation so critical?**

Strategy implementation is critical because that is the only way the organization will achieve the strategic goals identified. There would be no need to design a strategy if there was no intention of delivering on that strategy. Why do it? The only way the organization will achieve their strategic goals is through delivery, or implementation. The only way.

### **What is strategy delivery?**

Strategy delivery refers to the implementation, execution, or action of bringing the strategy to fruition. The work involved with the strategic initiatives to achieve the goals.

### **Where can I find a strategy glossary?**

Ask you and you shall [receive](#)....

### **What is a typical strategic planning process flow?**

This is the [process map](#) that I use with my small business clients. I developed this visual to help clients understand the various steps involved in the overall strategy lifecycle. Like projects, a strategy has sequenced activities that need to take place to build the foundation for a successful plan.

**How do you effectively communicate strategy within the organization?** Constantly. Like projects, an organizational strategy requires constant communication if you want buy-in, understanding and commitment from the employees, volunteers, members, and community. I strongly recommend that the Strategy Coordinator develop a communication plan that will include regular status updates, a page on the intranet/Sharepoint site that will allow employees to track the progress of the strategic activities, Lunch N' Learns, Zoom meetings to discuss updates, including strategy updates in every team meeting, thanking colleagues and team members for their efforts associated with a strategic initiative or goal, posters, podcasts...have some fun with it and send out a puzzle to the employees regarding the strategy and provide (e.g.) Starbucks cards at random to the people that complete the puzzle. Send out a poll or survey to measure engagement of the employees in the strategy. Don't keep your strategy a secret!

***Did you know that 90% of employees do not know their organizational strategy? Wow. Keep it going, be creative, ask for ideas, set up some contests looking for ideas on how best to communicate the strategy elements. Be creative!***

### **Who are the Stakeholders for a strategy effort?**

A Stakeholder is an individual, group or organization that may be negatively, or positively, impacted by the strategy. Keep in mind that the impact can happen at any point during the strategy process – design, delivery, or management.

### **Why are Stakeholders important?**

Stakeholders in strategy are like Stakeholders in project efforts. They are important for many reasons including:

- The Stakeholders are the individuals, groups and organizations with the subject matter expertise relating to the strategic goals and the initiatives.
- The Stakeholders are the individuals involved in contributing to the strategy activities.
- For more information, check out the free [Stakeholder Start-Up Kit](#) on my website.



## **How do we identify the Stakeholders?**

A Stakeholder identification discussion with the strategic planning participants will help in the development of a list of potential Stakeholders.

Suggestion: At the strategic planning session, have an agenda item for Stakeholder Identification. This agenda item will trigger a discussion about who will be impacted by the strategy. Based on the discussion at the strategic planning session, document the following information:

- Names of the potential stakeholders
- Their role and how they might be impacted by the strategy

I would suggest that you repeat this identification process once the strategic initiatives have been locked down. The initiatives will expose a larger number of stakeholders that may not be identified during the planning stage.

## **How do I manage the Stakeholders?**

Once you have identified and documented the potential Stakeholders, you will need a plan to manage the Stakeholders which will include communication planning.

Communication planning will include identifying the needs of the Stakeholders. Stakeholder needs will change based on how they are impacted by the overall strategy. For instance, some Stakeholders may only be interested in some of the initiatives but not all the initiatives. Others could be interested in the timeline, some of the strategic goals and how the organization plans to achieve these goals. You will need to determine what information would be most valuable to your Stakeholder groups. Consistency is critical and important to Stakeholders.

As a Stakeholder, they are going to want to be informed of the progress, challenges, and overall status of the strategy efforts on a regular basis. Establish a communication schedule that is sustainable while also delivering value to your Stakeholder community.

Tips: A review of the final strategic plan, initiatives and how the strategy will be managed is a good starting point to help identify Stakeholders. Communication is vital to getting Stakeholder buy-in and support for the overall project.

Examples of communication activities can include:

- Providing status reports
- In-person meetings
- FAQ document (Frequently Asked Questions from Stakeholders)
- Online forum for Stakeholders to see updated information
- Point of Contact for Stakeholders if they have questions or comments.
- Consistency in communication is critical – with respect to timing, format, and style.

Important: Stakeholder management is not static. Stakeholders can change throughout the lifecycle of a strategic plan. I suggest that you include a review of the Stakeholder management plan on a quarterly basis during the comprehensive strategy review to ensure that it adequately reflect the needs of the current Stakeholders. Looking for more information? Check out my podcast on Identifying Stakeholders: <https://www.mbiconsults.com/podcasts/understanding-your-stakeholders>

Do you have another question about strategy that is not listed here? Send me a [note](#) and I can include it into the next version of this FAQ.

Thanks! Mary Beth