

# Have a plan, first

Strategize, execute, measure, assess and refine. These steps will set you on the path of long-term business success.

By Judith M. Guido / Columnist

It is rare that success in a design/build business happens by accident or luck. For most people, business success comes from planning — strategic planning and not reactive, after-the-fact planning. To many people, strategic planning is comparable to visiting the dentist. They know that it is important. They know that it produces positive effects. They know it is healthy for the organization. And yet, they dread and prolong it for as long as possible. Some companies even avoid it completely, stating they “don’t have the time” to do it.

Although it may seem like a painful, stagnant, mind-bending and laborious process, strategic planning is anything but that. When done properly, it is a highly energized, creative process that requires the intimate involvement, skill sets, imagination and creativity of everyone in your company. In this way, your people will buy into the plan, because they are part of the plan.

## A plan for every employee

Your plan also needs to be communicated to your entire company. It is not a report that is created and known only by the managers at the top, then handed down as a rulebook for all to follow. It is also not a static document, but a kinetic process that constantly evolves.

Your main purpose for creating a strategic plan is to help your company do a better job and create value for your customers, and therefore, yourself. It is the process of producing fundamental decisions, action plans, met-

## Step-by-step planning

Here is a simple outline that I have used successfully for both small and large design/build companies.

- 1 Do an environmental analysis**
  - Internal (strengths and weaknesses)
  - External (opportunities and threats)
- 2 Determine the mission, values and vision** (What business(es) is the organization in? What is the organization’s purpose?)
- 3 Identify key problems**
- 4 Clarify the responsibilities**
  - Develop an appropriate organizational structure
  - Clarify the responsibilities for each individual
- 5 Prioritize**
  - The problems for the organization
  - The projects for each unit
  - The responsibilities for each individual
- 6 Determine the long-term goals for the organization, each unit and each person**
- 7 Develop plans to achieve the long-run goals**
- 8 Determine the short-run objectives for the organization, each unit and each individual**
- 9 Determine the policies for the organization and each unit to achieve the short-run objectives**
  - One policy for the organization is to develop an appropriate service/product line (using portfolio analysis)
  - Policies should also be developed (for such functional areas as operations, sales, marketing, accounting, purchasing, information management, human resources)
- 10 Grant each individual specific, clear-cut authority** (based on their experience and abilities) to achieve their goals and objectives
- 11 Determine the controls** (Provide information to the organization, each unit and each individual about their progress toward achieving both short-run objectives and long-run goals.) This includes having:
  - A management information system; and
  - A performance appraisal system
- 12 Develop each individual to gradually handle increasingly complex responsibilities**
  - Through coaching
  - By providing a series of successes

## Step-by-step planning CONTINUED

### 13 Develop teamwork

- By requiring managers and supervisors to hold regular meetings with their people
  - To develop goals, plans, objectives, and policies
  - To monitor progress toward goals and objectives
  - To identify and solve problems
- By requiring managers and supervisors to hold cross-functional meetings to identify and solve common problems and transfer ideas (and technology)

### 14 Participate with both individuals and teams before making decisions (“actively listen”)

### 15 Provide training on a regular basis (both technical, managerial and supervisory), including cross-training

### 16 Support your people

- With the proper tools and equipment to get their jobs done well
- With good supervisors and managers

### 17 Select capable individuals and teams to handle the various responsibilities

### 18 Reward and discipline based on performance

### 20 Assess the plan every six months

- Enhance what went well
- Understand what went wrong and refine
- Introduce the new people, processes, products and technology

rics, feedback mechanisms and rewards that will shape and guide:

- what your company is
- what your company does
- why you do it
- where your company is going
- how your company adapts to market changes.

Assemble your people, get their creative juices flowing, design your strategic plan and build a profitable company. Try it, you’ll like it ... and so will your customers! ■

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