

Strategic Planning for the Future: Opportunities & Challenges

- Lyn McDonell CAE. C. Dir.

If we expect that over 30% of association activity will undergo revolutionary change in the next five years, we may be in the right ballpark for how disruptive future changes will be. Strategic planning has always been about looking ahead and responding proactively however we've not been in this environment before. As industry boundaries are redrawn, new technologies leapfrog in functionality, and entrant organizations and businesses challenge associations' traditional value propositions, few associations can coast into the future assured of their relevance and sustainability.

Your next strategic planning process is critical to get right. How should savvy association leaders approach strategic planning? Here are some of the new rules:

1. Vision is essential! Consider the tributes to the late Steve Jobs. So many spoke to the power of his vision for Apple Inc. A vision is not a strategy but it precedes a strategy. The best organizations have an understandable and inspiring vision, an internalized view of where the organization is headed and what it is really about. It is not easy to craft because it starts with pictures and not words. Although the official vision may have a nearer-term view, think of your association's relevance and work in the year 2020. That timeframe surfaces the courageous, fundamental shifts required as well as the core value that should drive structural change.
2. Get outcomes crystal-clear – not just the “how to” strategies. Outcomes flow from vision. They are those “arrival” points that define success. Since there may be more than one way to get there, outcomes are how you should measure success. Traditional methods and channels are not to be assumed.
3. According to corporate innovation thought leaders Jeanne Liedtka and Tim Ogilvie, we need “design thinking.” They suggest organizations first gain a clear-eyed view of reality then ask the “what if” questions. Don't start with constraints. It is easier to figure out how to overcome constraints when you have a positive direction.
4. Embrace scenarios. Scenarios are plausible narratives about futures that are distinctly different from the present. When thinking about the future, don't ask “What will the future look like?” because the future is the net result of so many factors. Instead, identify possible challenging futures. Ask “what are all the potential ways in which things could evolve in the future? In terms of our members, who they are and what they do? In terms of how people access learning or make connections?” And so on. By exploring different ways the future could unfold, the organization builds a suite of scenarios enabling organizations to better respond in real time.
5. Appreciate the JTBD of your members in your strategic plan. According to David Silverstein and Philip Samuel Neil DeCarlo, the “job to be done” (JTBD) of customers, clients or stakeholders is key. It is what your members are wrestling with in their environments – leading to how they will judge value. To understand what your members are trying to do requires deep connection and listening to what they need help with. That is the JTBD and where associations can perhaps help and offer new value.

6. Belonging to a group has a tendency to make us conformist. As an antidote, invite leading thinkers in your field to contribute. Consider convening a “sounding board” of CSAE peers and industry or sector gurus to seed the plan with insights from other sectors or to respond to your thinking. People whom you respect can provide insight on your most perplexing questions and/or feedback on the emerging strategic plan.
7. As organizational and business thinkers, we admire a strategic plan with measurement. The drive to ensure hard measurable goals is worthy but heading there too fast in strategic planning can dampen exploration of new ideas. First ensure your overall strategy is creating relevant value, and then worry about measurement.
8. Strategy should be simple. You should be able to explain it. It should make sense to members, employees and stakeholders. It should also be strategic -- meaning that it will sound smart and responsive to the circumstances facing the association. It should add up to “wow, that makes sense.”

Finally, and so important, planning must be about engaging people. While the strategic plan is ultimately set by the board of directors, planning has the potential to lift sights and spark the passion of everyone connected. And, when people are involved, they have ownership. People make plans come alive, and that is the ultimate testament to a successful strategic planning process.

Lyn McDonell, CAE, C. Dir., is President of The Accountability Group, Inc. providing consulting and training services to not-for-profit organizations in governance, strategy and organizational accountability.