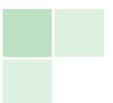




Business DNA Case Studies:

Strategic Planning Process



STRATEGIC PLANNING PROCESS

THE CHALLENGE

The business began its strategic planning exercise intended to encapsulate the thinking, which had gone into setting the direction of the organization. Its purpose, to provide a framework or route map against which more detailed annual business and functional plans could be developed and reviewed. The problematic step seemed to surface in the action planning process determining who was to do what to give life to the strategic plan. The plan may not have been able to necessarily satisfy everyone but in what was a difficult economic climate for the business they needed to have a strategic plan that would navigate them successfully through the next 3 to 5 years. Determining where they wanted to see the business in 3-5 years had the potential to cause the whole process to grind to a halt.

THE PROBLEM

Past experience suggested the plan wouldn't work so no one took the exercise seriously. Some disconnected themselves from the parts they didn't agree with or couldn't deliver. When asked to provide information to feed into the plan they avoided rigorous analysis; they failed to link the planning process with execution and talked about impossible to deliver timelines. They could not agree on:

- The main focus areas
- Where the business chain was weak – how could it be strengthened
- What continuous improvement activities were required to get results
- How to determine the 'share of the financial pot'

People protected their own corner, they felt vulnerable: Those charged with building market share felt hampered by the CFO believing she always said 'no' rather than working with them to say 'yes' and *let's see how we can make that happen*. Activity tended in the past to be random leading to an inconsistency of service and performance.



THE BUSINESS DNA SOLUTION

The organization engaged the services of the DNA Behavior Group to provide a designated person to work with the strategic development team in order to prevent issues from being personalized, and to keep the process on track. The DNA Group worked out what the organization needed to do about timing, participants, input and any pre-work required. Who should do what and planned how to set things in motion so that the right people were involved and that each knew the importance of sharing information with each other and having a clear understanding of what the organization wanted to achieve.

IMPLEMENTATION AND STRATEGY

The DNA Behavior Group took all key personnel involved in the strategic planning activity through the DNA Behavior Discovery & Performance process.

The outcomes revealed:

- Individual natural talents and how to productively apply these in their performance
- Individual behavioral and communication styles and how understanding their own and having insight into other colleagues could expose gaps/opportunities to build working relationships
- Fears in terms of execution of roles and responsibilities
- The wider skill-set of the individuals who completed the process
- Each other's perspective in terms of the building and the implementation of the strategic plan
- Potential 'hot spots' in behavioral clashes
- Critical issues to be resolved

OUTCOME

The strategic planning team quickly understood the importance of working together to produce a workable plan and could see how the organization could be more effective by getting the planning process right. Each began to see the value they brought to the business and through using the DNA Behavior Discovery & Performance process understood more clearly why individual behaviors and fears had been getting in the way of the strategic planning process in the past.

They were each able to see the strategic process in a new light and to understand its value to the business. 6 and 12 monthly reviews to be conducted over a 3 year period. The first review period showed the process was on track, the business moving ahead effectively and the strategic planning team working well together.