

GETTING YOUR TEAM INTO ACTION:



An Introduction to Whole-Systems Strategic Planning

*OnTheCrest Consulting
For CEO Netweavers*

Agenda

- Welcome
- What is Whole-Systems Strategic Planning?
- How It Works
- Why It Works
- Uses
- Cases
- Who Should Attend?
- Benefits
- Nuts and Bolts
- The Right Time to Conduct this Process
- And the Wrong Time...
- Open Forum
- Reflections
- Further Information

What is Whole-Systems Strategic Planning?

Whole-Systems Strategic Planning is a 1.5 to 2.5-day event used by an organization to move in a new direction quickly.

How It Works: A "Typical" Whole-Systems Process

- ❑ A Focus Question (Purpose of the Process)
- ❑ Environmental Appreciation
- ❑ Systems Analysis:
 - ❑ History of the System
 - ❑ Desirable Future
 - ❑ Current Reality
- ❑ Strategies & Action Plans
- ❑ Follow-Ups

How It Works (cont.)



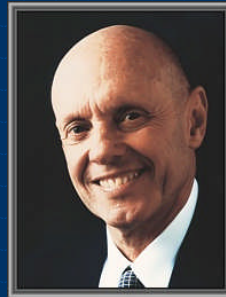
Why It Works

- Autocratic Leadership vs. Democratic Leadership* (Lewin and Lippitt)

* With a Goal Focus and Active Leadership

Why It Works (cont.)

"No involvement, no commitment."
- Stephen R. Covey



Why It Works (cont.)

- ❑ The Power of a Solutions Focus vs. Problem Solving (Lippitt)
- ❑ Working Mode vs. Fight-Flight; Pairing; Dependency (Bion)
- ❑ The Transformative Power of Information (Wheatley)

Why It Works (cont.)



Uses

- Strategic Planning
- To Create a Future Vision
- Merging Cultures
- Work Redesign
- Discussion and Exploration of Systems Issues
- Develop shared "best practices"

Cases

- ❑ Weyerhaeuser Forest Products: The Strategic Planning Group Gets Renewed
- ❑ McDonald's: Breakfast!
- ❑ Shell: A Project Team Gains Perspective
- ❑ Microsoft: Viable Marketing
- ❑ Boeing: 777 Takes Off!
- ❑ Altech: Everyone in Gear

Who Should Attend?

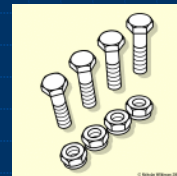
People who have a critical knowledge of the organization and environment and can take responsibility for implementing the plans.

The Question to Ask: *Can this person actively contribute to achieving the stated purpose of the conference?*

Benefits

- ❑ Builds a team culture without doing “team building”
- ❑ Finds common ground: the only practical way to control change
- ❑ Saves time, because the whole system is in the room
- ❑ Since the planning is done by the people who will carry it out, people are motivated and committed to action

“Nuts & Bolts”: Conditions for Success



- ❑ 1.5 to 2.5 Days (“Sleep Twice”)
- ❑ Little or no training or presentations—the participants work hard!
- ❑ Full attendance
- ❑ Healthy open meeting conditions

The Right Time for a Whole-Systems Strategic Planning Process

- At the beginning of a new venture or undertaking.
- When a new direction is required with an existing venture.
- Soon after new leadership is in place.

(cont.)

The Right Time *(cont.)*

- When the lack of productivity and profits, the rock-bottom morale, or high employee turnover can no longer be tolerated.
- When the external forces of the competition, new technology, or the global economy are so powerful that the company must respond in whole new ways.

And the Wrong Time. . .

- ❑ When there is no apparent need to do things differently.
- ❑ If the leader doesn't champion it.
- ❑ When people want a quick fix to a deep problem.

(cont.)

The Wrong Time *(cont.)*

- ❑ If it is performed around a non-issue or merely a surface issue—that is, when the focus is to “straighten things out.”
- ❑ It works best with core issues.

Further Information

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