

# Key steps in strategic planning: processes, actors, and leadership



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# Objectives

- **Explore the concept of SP: origins, evolution and its links with the managerial ideologies.**
- **Highlight the meaning of SP: main concepts**
- **Think over its obstacles and keys to success (research in progress).**
- **Warning you from making mistakes as supervisors of S Plans.**

# What we mean by the term “Strategic Planning”

**In a few words...**

**Set of leadership roles, concepts, procedures, and tools that can be carefully adapted to our organizations to achieve the desired results.**

**But also... well it's a long story**

**SP is a means to integrate any organization**

## **Differentiation & Integration**

**The SP has gone along with capitalism and fits perfectly our current bureacratic organizations**

	Organizational Context	Managerial Ideology	Outcome
1760-1875	1 <sup>st</sup> Industrial Revolution	Social Darwinism	Pre-bureaucratization (Rules rooted in cultural codes and traditional values)
1876-1925	2 <sup>nd</sup> Industrial Revolution	Bureaucratic Model	Rationality, efficiency
1926-1945	Universalization	Scientific Management	Introduction of techniques for maximizing productivity (planning)
1946-1960	Human Relations Focus	Postaylorism - Industrial Psychology	Quality management focus
1960-1980	Modernization of Public Organizations		Psycho-social development (leadership, teams, motivation)
1980-2000	3 <sup>rd</sup> Industrial Revolution	Neo Taylorism / Digital Taylorism	Organizational effectiveness – Flexibility
2000-	Global Economy / e-Technologies		Focus on training; organizational change; team building; digitalization of production

**Let`s go back to SP... It involves...**

**Assuming risks / Analysis and research /Thinking globally**

**6 Basic Steps**

- **Develop the strategy**
- **Plan the strategy**
- **Align the organization**
- **Plan operations**
- **Monitor and learn**
- **Test and adapt**

# Evaluating the organization

**Leaders have a vital role from the beginning and must ensure adequate conditions for carrying out the process, or take the steps necessary to create adequate conditions.**

**Formulation  
of Strategic  
Elements**

- **Mission** (our purpose)
- **Vision** (what we want)
- **Values** (our principles)



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### STRENGTHS

- Differentiation
- Adaptation to the environment
- Core Strategy (vision, mission)



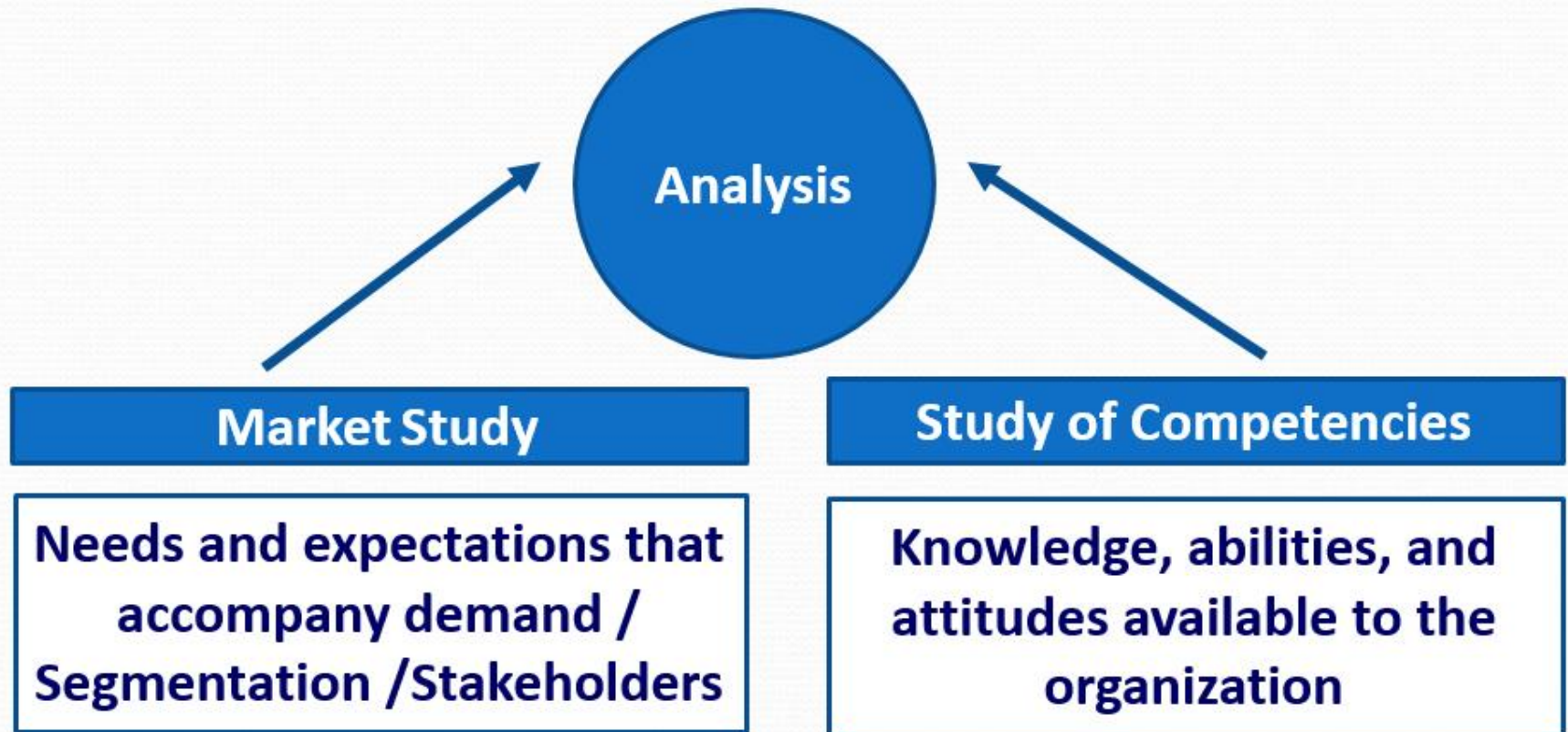
Info

[www.uu.nl/strategicplan](http://www.uu.nl/strategicplan)



# Exploring the context

**Involves making appropriate internal and external diagnoses, using analysis techniques and methodologies.**



## Some best practices (3)

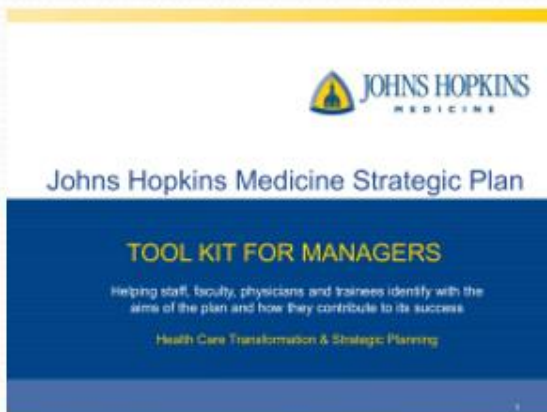


### JOHNS HOPKINS MEDICINE STRATEGIC PLAN



#### STRENGTHS

- Stakeholder involvement
- Organization
- Training policy



Info

[http://www.hopkinsmedicine.org/strategic\\_plan/](http://www.hopkinsmedicine.org/strategic_plan/)

# Determining objectives: feasible pathways for developing the organization



## Doing operational planning

- **Promote actions for dissemination, informing, and training.**
- **Specify the actions that must be completed**

**So...**

- **Develop a management cycle that links actions to strategic lines**
- **Categorize the activities that must be completed into opportunities**
- **Identify the key actors and assign responsibilities**

## Some best practices (1)

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#### STRENGTHS

- Design & Identity
- Information policy
- Commitment



#### Info

<https://www.upf.edu/en/web/plaestrategic/home>

# Monitoring...

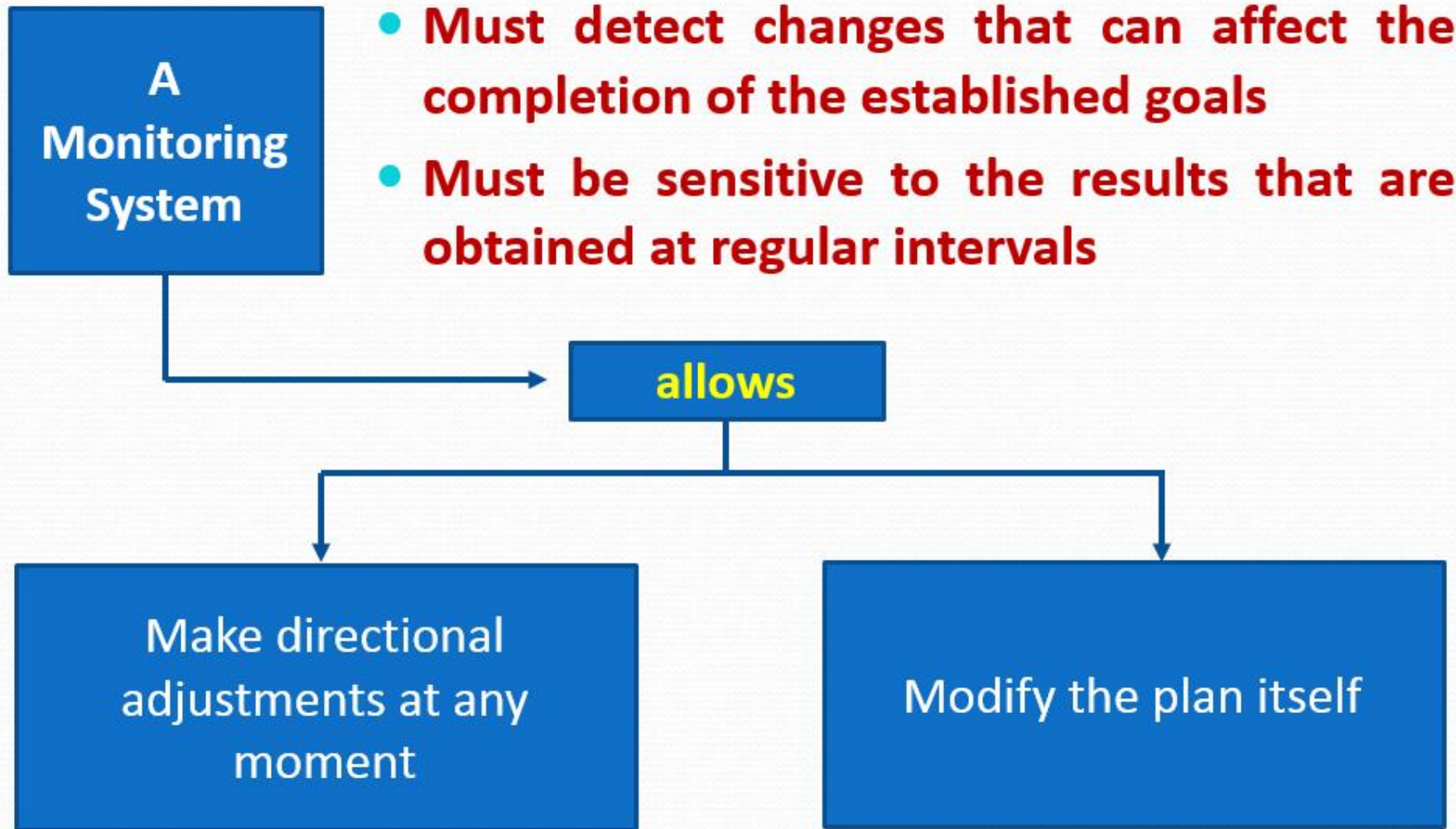
**A  
Monitoring  
System**

- **Must detect changes that can affect the completion of the established goals**
- **Must be sensitive to the results that are obtained at regular intervals**

**allows**

**Make directional  
adjustments at any  
moment**

**Modify the plan itself**



## **...and Evaluating**

**Involves more than reviewing the results based on indicators...**

**It requires arriving at conclusions that allow you to adjust your course as needed and implement actions that incorporate those conclusions in the following phases**

## Required leadership skills

- **Adaptive capacity** (change is not the exception but the rule)
- **Determination** (overcome any obstacle that appear; to apply energy)
- **Commitment generation** (people need to feel that the vision and mission have been discovered by them , not invented by others)



# 15 keys to successful strategic planning...

- **Get everyone involved and committed**
- **Correctly define the objectives, goals, and strategies**
- **Have and use an adequate monitoring system**
- **Analyse the context correctly**
- **Share the project and the results through socialization and communication**
- **Identify and correctly manage resources**
- **Have a clear direction**
- **Ensure quality information**
- **Be rigorous about methodology**
- **Show commitment to the internal (personnel) and external recipients**
- **Correctly assess risks and develop contingency plans.**
- **Correctly identify the actors involved**
- **Apply appropriate decision-making**
- **Identify problems that must be resolved**
- **Delegate responsibilities appropriately**

## ... and 15 keys to failure

- **Low flow of available resources**
- **Changes in leadership or the planning team**
- **Lack of motivation or commitment**
- **No adaptation to contextual changes**
- **Personnel with scarce / insufficient technical training**
- **Poorly developed objectives and strategies**
- **Poor or deficient diagnoses**
- **Deficient monitoring**
- **Lack of leadership**
- **Resistance to change**
- **Failure or error in identifying the actors involved**
- **Seeking short-term benefits**
- **Lack of consistency**
- **Poor information/indicators**
- **Seeing the plan as an end in itself**



**Thank you**

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