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Now that the holiday madness is over, January is a fabulous month to reflect and prepare for the New Year. A strategic plan and strategic initiatives are so much more than your cliché New Year's resolutions. You can plan and strategize for yourself, your team, or for your organization. When you implement the tips in these articles, you will have a guide for making decisions going forward all year round!

Kristin

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QUICK TIPS TO DESIGN A STRATEGIC PLAN FOR 2019

Wishing a Happy New Year to all from not-quite-so-warm Scottsdale, Arizona! This is a great time to reflect on the past year in preparation for putting together your operational or strategic plan – whether you do this for yourself, your team, or for your organization.

1. First, do an internal scan:
 - SWOT analysis: What are your strengths and weaknesses? What are the external opportunities and threats or limitations?
 - Review the past year: What went well and what would you do differently?
 - Take a look at your leading and lagging metrics – did they improve, stay the same, or decline?
 - Take a good look at your products and services – are they in a growth mode, maintenance or declining? How much do they contribute to your definition of success?
 - Think back to anything your customers might have been telling you during a survey, feedback, offline conversations. What is the “voice of the customer” telling you?
2. Then do an external scan of your environment:
 - Competitive analysis
 - Demand for your products and services
 - Innovations
 - Changes in technology

You put all of that into the pot of ideas, swirl it around. Ask your friends and family,

teammates, and others in your organization for more input. You'll be amazed at what you'll hear!

Then magically (okay, 9 times out of 10), 3-5 critical issues surface to the top. These things are of a strategic nature (will take longer than a year, encompasses more than one function, and significantly propels you toward your definition of success – otherwise known as a “vision.”)

These 3-5 issues become your strategic imperatives for the year(s) to come!

HOW TO BREW UP STRATEGIC INITIATIVES AND PLAN FOR THE LONG TERM

It's finally here! This is the week Joe and I have set aside to do our strategic planning. We'll work in the morning and play in the afternoon. No other work. No obligations. Just focused time on the business.

In preparation for this week, we've done our internal and external scanning ([see last week's post](#)). It's been simmering in that cauldron of ideas and now we'll be plucking out the emerging strategic initiatives. It's a somewhat magical process as the critical issues and gaps seem to float to the surface, ready for picking! So how does that happen?

After your scanning, you review (or create if you don't already have) your mission, vision, and values. That forms the context for the following “strategic thinking” discussion.

The absolute most important piece is your “vision” for the next three (or so) years. What would energize you, your team, and your company? What wouldn't be too huge of a stretch? Some call this a BHAG (big, hairy, audacious goal) and frankly, I don't care what you call it. But you have to have a firm idea of what “success” looks like *and* agree that this is where you want to take the organization.

From this vision, ask two key questions: What are the gaps between our current state and desired state? What are the critical issues that must be managed? When you ask these two questions (oh, yes, there can be more, yet I find these yield the magic!), you'll see a handful of key themes or “categories” emerge. You turn these categories into your “strategic initiatives.”

For example, a critical issue might be, “Training our personnel in new skills needed to achieve our vision” and a gap might be, “need for talented people that we don't have on board right now.” Says kinda the same thing, so the category header might be “talent.”

The strategic initiative statement might be “Have skilled personnel able to expertly and efficiently fulfill their job responsibilities.” Or, if you are a [Jim Collins](#) fan, it might be, “Have the right people on the right seats on the bus.”

Get agreement on these five strategic initiatives (no more than five, or your probability of successfully achieving your strategic initiatives significantly decreases). Whew! You've now completed the strategic thinking phase and ready to move into long-term planning:

Take each strategic initiative and ask, “What needs to happen in order for us to be successful?” From this discussion, you'll create your implementing strategies – the key milestones to your success! You may even find a few “two-fers” or “three-fers” that cut across two or three strategic initiatives. These are the highly leveraged activities that you must get right!

Ask for a champion for each initiative to ensure progress gets made and have at least one leading and one lagging metric. Capture it all on one page and use that one-page plan as your guide for making decisions going forward. Voila! Time to go play!

HOW TO PREPARE YOUR PANELISTS TO BE BRILLIANT

A recipe for panel disaster is allowing the panelists to “just show up” and expect brilliance to spring forth. Sure, it could happen if the panelists are socially aware, have met each other before, and are willing to stay focused on the topic. But without any preparation, it probably won’t go so well.

I’m a big fan of preparing the panelists ahead of time as to the process we’ll be using – and not so much about the content. If you talk too much about the topic beforehand, then you’ve already had the panel discussion and the audience loses out on the spark and spontaneity of live interaction. It’s a delicate balance.

Here are my suggestions on how to prepare your panelists to be absolutely brilliant on game day:

Pre-Event Email. Send them a pre-event email with the following information:

- *Panel Info.* Panel title, date, time, location, description, objectives and promotional material.
- *Panelist Info.* Names, short bios and websites of other panelists, where to register and where to meet up just prior to the start.
- *Panel Format.* How you plan to run the panel and the first one or two questions you intend to ask.
- *Audience.* Audience demographics and estimated size so panelists can bring the appropriate number of handouts, books, etc.
- *Room Setup.* Backdrop, chairs and platform configuration.
- *Presentations.* Specific instructions, e.g., time frames, slideshow format, getting the slideshows to you, etc.
- *A/V.* Audio-visual capabilities and requirements, e.g., microphones, coordination of video, presentation, etc.
- *Promotion.* Degree of appropriate self-promotion as well as use of social media.
- *Pre-Event Meet Up.* Ask if they are willing to join a brief call to plan the session and if so, best times to call.

Pre-Event Meet Up. A short conference call or video conference (30 minutes) a week or two before the panel allows the opportunity for everyone to connect and hear the same information sent in the email as well as ask any format questions. You don’t want to conduct the panel beforehand, so keep this light and social. If you believe there might be a lack of controversy or potential overlap in answers or opinions, you *may* want to probe each panelist’s approach to the topic. It is also a nice touch to invite the meeting chair/planner to attend/listen in. Here are some key items to cover:

- *Welcome.* Set the tone for how excited you are.
- *Panel Info.* Panel title and objectives.
- *Self-Introductions.* Name and two sentence focus area of expertise, approach or opinion. Be firm in enforcing the two-sentence rule – you are modeling being an effective facilitator!
- *Audience.* Review the audience demographics and size.
- *Panel Format.* Review the format/agenda.
- *Questions.* Share the first few questions you will ask during the panel and see if there are any questions they want you to ask.
- *Props.* Encourage props or items to help the conversation or illustrate a key point.
- *Other?* Open the floor for any questions from the panelists.
- *Event Meet Up.* Confirm the time and location (speaker lounge, green room, etc.) to meet about an hour before the event to go over last-minute issues.

Final Confirmation. Take notes during the pre-event meet up and email them to all panelists. This also serves as an excellent final confirmation of their participation.

Break Bread. Invite the panel to go to breakfast, lunch or dinner together, especially if they have not met. This is meant to be an opportunity to relax, get to know each other and build a rapport that will be obvious on stage. It is NOT the place to hold the panel discussion!

Touch Base. As soon as you get to the venue, seek out your panelists to say “hello.” Help them get settled, remind them of the objective and ground rules, and answer any last-minute questions they may have. Chances are they don’t need your help, but they will appreciate the effort – and it allows them to be brilliant on stage.

FROM THE BOOKSHELF: A BETTER WAY TO READ THE NEWS

When it comes to news, it seems as if all the news outlets (TV and newspapers) are blatantly biased. As we switch from Fox to CNN, read the newspapers (AZ Republic since we live in AZ and the Wall Street Journal), and peruse the internet (what a wormhole - and who knows if it is “fake news?”) we hear completely different interpretations of the same event. It’s all so very confusing.

That’s why we like “[The Week](#)” magazine. No, we don’t keep it on our bookshelf, but we do look forward to receiving it in our mailbox every Saturday morning (or view it on our iPads). It’s a quick read magazine format (about 32 pages) that covers national international news, as well as science, technology, health, the media, business, and the arts. We even enjoy the “people” and “real estate” section! (My favorite is “It Must Be True, I Read It in the Tabloids” section!)

What we like about it is that it “[provides perspectives](#)” (note the plurality of the word “perspectives” on the week’s current events and other news, as well as editorial commentary from global media, with the intent to provide readers with multiple political viewpoints.” And those perspectives are written in a compelling, story-like fashion.

I can’t say that it is completely non-biased (leans a little to the left), but it does a pretty darn-good job of netting out the issues in a non-partisan way.