

Strategic Assessment and Plan: Phase 3

How are we going to get there?

In the [first article](#) in this series we discussed Phase 1 of the Strategic Assessment and Plan: *Where are we?* That assessment phase included the first three steps of the 10-step plan. Phase 1 was where we determined our mission, the leader's responsibilities, and analyzed the environment in which our organization exists or functions. The [second article](#) examined Phase 2: *Where do we want to go?* In that phase we looked to the future by working through steps 4 through 7 to develop our vision and organizational values; identify key processes and systems; determine gaps in performance; and finally, establish objectives and goals. In this third article we will explore the next phase of our plan: *How are we going to get there?* This phase, which has a single step, requires the development of an implementation plan and systems for monitoring performance.

Step 8 involves development of an implementation plan for the objectives and goals determined in Phase 2. Remember that each objective and its associated goal(s) is carefully selected to close a measurable gap between our current level of performance in key systems and processes and the desired future state. For each goal, we must determine:

- A. Who will be assigned responsibility for completion of the goal?
- B. What steps are to be accomplished?
- C. What resources will be made available?
- D. How should the work be accomplished?
- E. When do we want the goal completed?

Who will be held responsible for accomplishing the goal? This involves *delegation* of responsibility from a leader to a subordinate. This must be done since a task cannot simply be assigned to a group of people with the expectation that they will accept the responsibility and accomplish the task. Some *one* must be held directly responsible. Successful delegation involves three elements: *responsibility*, *authority* and *accountability*. If any of these three are missing, delegation will likely fail. When a leader assigns *responsibility* for a task to a subordinate, he is, in effect, transferring *his* responsibility to that person. As discussed in [Phase 1](#), the leader is responsible for everything the organization does or does not do. But he can and must delegate direct responsibility for tasks to subordinates. In order for the person to effectively accomplish the task assigned, he must also receive the *authority* to call upon resources needed to accomplish the goal. Those resources may include people, material, technology, funds, equipment, time, or whatever is needed to get the job done. Finally, the person assigned will be held accountable for accomplishment of the task.

The steps to be accomplished are a series of events that must be completed in order for the goal to be realized. At this level they should be generalized while leaving the details to the person assigned and his/her team to determine. The same principle applies to the question of how should the work be accomplished. Leave the details to the leader and his/her team to determine how best to accomplish the steps.

The resources needed to accomplish the task must be authorized or assigned by the senior leader whenever they exceed the normal level of authority of the delegated leader. This is best done in writing and formal notice given to other senior leaders in the organization of

the delegated leader's authority and the duration of the task. This is especially important when people from another part of the organization may be required to assist in task accomplishment.

Assigning a date/time for goal accomplishment makes very clear to all when the job must be done. If follow on tasks will depend upon completion of the task assigned, this should also be known to the person assigned and his/her team.

One way to display goals is with a grid, as depicted below.

GOAL	WHO?	STEPS	RESOURCES	HOW?	WHEN?
Determine customer needs in E. Germany	Roger Smith's team in marketing	<ol style="list-style-type: none"> 1. Survey potential customers 2. Determine substitutes 3. Identify brand loyalty 	<ol style="list-style-type: none"> 1. Smith's team of 4 2. Direct mailing up to 20,000 homes 3. Funds necessary for analytic reporting by contractor 	<ol style="list-style-type: none"> 1. By random survey 2. Suppliers within E. Germany 3. Buyers for major retail chains 	Final report by 15 July
Determine suitable space for youth center	Jim Brown, Youth Minister	<ol style="list-style-type: none"> 1. Determine our youth population over next 15 years 2. Determine square footage and facilities needed 3. Identify available structures w/i 3 mile radius 	<ol style="list-style-type: none"> 1. Brown + Facility Director 2. Church Realty Division 3. Church sedan 	<ol style="list-style-type: none"> 1. Review projected demographic growth in youth population 2. Survey our youth & other churches with youth centers for facility needs 3. Major realtors for buildings availability 4. Prioritized list of buildings under \$500K 	Preliminary report by 1 Dec; final report by 1 Jan

The [last article](#) in this series will discuss Phase 4: *Are we getting there?* In this final phase we establish a review process for changing our strategic direction and ensuring that our plan stays fresh and relevant over time.

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