

**5 Keys to  
Streamline Your  
Strategic Planning  
Process**

# 5 Keys to Streamline Your Strategic Planning Process



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# What is Brainzooming™

THE BRAINZOOMING GROUP

Since launching in 2009, Brainzooming has been consulting to clients across industries. We design and implement engaging, productive, and fun strategy processes; they lead to successful collaborative plans and results.

Clients most frequently ask Brainzooming to develop strategies for their important opportunities in:

- Organizational transformation
- Innovation
- Branding
- Leadership

We offer Brainzooming services and content through:

- Custom engagements in-person, online, and hybrid
- Blast! online collaborations delivering ideas and impact in thirty minutes
- Speaking and training programs, both in-person and online
- Digital books, magazines, courses, articles, and tools that translate the Brainzooming method into DIY resources

## The Brainzooming Approach to Collaboration

The Brainzooming method and tools emerged from inside a Fortune 500 organization. The result? Our approach makes us the collaborative, results-focused type of partner that you want as a client.

From our first conversation with you, Brainzooming translates your objectives and aspirations into a collaborative process. We are tenacious in delivering your most important outcomes. Through inviting and supporting diverse participants, we'll empower them to positively shape your strategy, implementation, and results.

If you have been searching for a partner who prizes collaboration, diversity, flexibility, learning, results, and fun as much as you do, your search is over. You are ready for Brainzooming!

**brainzooming.com**

## 5 Keys to Streamline Your Strategic Planning Process

**Strategic planning is one of those tasks most people would rather put off. And no wonder: it's gotten a bad rap over the years.**



There is good news, though. It's absolutely possible for your organization to roll out a simplified strategic planning process.

Yes, really.

### **Same-Old, Same-Old Methods Are Ripe for Streamlining**

At The Brainzooming Group, we believe in putting more “brains” in strategy, and we're just as convinced that **strategic planning should zoom along more quickly than you'd expect.**

# What's Streamlined Strategic Planning Look Like?

A few things are vital for making strategic planning zoom.

Greater productivity, no unnecessary steps, and keeping nimble where options are concerned. **Zooming happens when people are allowed to develop and deliver the information and insights they already know.** Instead of making them complete countless planning documents, we prepare the documents and let clients focus on what they do best.

When we received a call from a senior VP, requesting help for his subsidiary president who was on the line to deliver a business plan in just days, we got right to work. Assembling creative and strategic thinking exercises, we collaboratively **moved from SWOT analysis to completed business plan in just twelve hours over two days.**



Mike Brown  
Founder  
The Brainzooming Group

*Photo by: Leslie Adams*

## Adopting a Different Approach to Strategy Development

In this eBook, we share some of what we've learned from shaping and implementing hundreds of strategy sessions. Through our experience, we've identified dependable ways to help non-strategists think strategically and quickly develop solid plans. **These user-friendly techniques regularly cut weeks (sometimes months) from typical strategic planning methods.** Best of all, you can adapt them to your own situations to make them as efficient and effective as you need them to be.

**What are the best  
ideas to make  
strategic  
planning  
less  
cumbersome?**

# THE 5 KEYS

1



**Involve the right people.**

2

**Eliminate the cumbersome and unfamiliar.**



3



**Integrate strategy planning with what drives day-to-day activities.**

4

**Match strategy exercises to your business needs.**



5



**Pick planning steps that fit your organization's strengths.**

# Involve the right people.

# 1

We recommend assembling a diverse group to work together. A collaborative approach creates more thorough and robust plans. **By involving more people, we easily turn weeks of solo work into a one-day group collaboration that generates significant input into a strategy plan.**

## People with Frontline Business Experience

This includes operations, sales, customer service, and any other areas with P&L responsibility or close customer interaction. They provide a solid view of what's going on in the business, what customer and competitor issues are ongoing or arising, and what strategy areas need attention.

human resources, information technology, accounting, finance, etc.

## People with a Creative / Innovative Orientation

These people, regardless of prior knowledge of a strategy effort's focus or experience, are adept at looking at business, industry, and organizational situations in unconventional ways.

It's important to note that assembling **the right mix of participants is critical.**

The **three types of critical thinking perspectives** vital to great strategic thinking, planning, and implementation are:

## People with Functional Expertise.

Leaders in support areas of the business should bring insights into strengths, weaknesses, and key opportunities for important business processes including marketing,

These three groups are key, because they tend to see and react from very different perspectives—which is vital for creating the best strategic plans.



# What happens if you involve *only* people with one of the three desired perspectives?



## All Creative People

And involving only creative people in planning? Trust me: you'll get incredibly cool ideas that don't have a good way to get to market successfully.

## All Frontline Business People

Frontline business people, left to their own devices, tend to come up with more conventional, incremental strategies. Because they're so close to organizational operations, there can be a real reluctance to stretch capabilities.

## All Functional Experts

If only functional experts are involved, you're liable to get great process ideas and strategies which improve the internal workings of a business but may not have the necessary impact on business results.

## Want to do a little extra?

Also make sure that beyond the typical leaders, your participants include emerging leaders that wouldn't typically make it into strategy meetings and challenger voices that take issue with the status quo.

**For the strongest strategic plan, you need to include people with each of these three perspectives.**

# Eliminate the cumbersome and unfamiliar.

## 2

We see it all the time. Most executives can't write strategy plans. It's not terribly surprising. Strategy planning is an infrequent task. (It's tough to master things we don't do often!) Strategic planning also typically requires people to deal with complex templates unrelated to daily business.

Templates make it easy to compile the work participants are left to their own devices to figure out and complete. **The problem is people who aren't full-time strategic planning fanatics don't have efficient and effective ways to generate the necessary answers.** And since these

**But it doesn't have to be like that.**

We use productive interactions to change the strategic planning process from completing complex forms to great engagement via conversations, events, and experiences. Yes, it's possible!

audiences, they can strategically, creatively, and efficiently develop smart business strategies.

Output from these strategic collaborations and exercises can then be shaped into a more formal strategic plan—a step best left to internal or outside parties that specialize in writing direct and efficiently-implemented plans.

By removing the tedious aspects of strategy planning and replacing them with efficient alternative approaches, participants can positively contribute in ways that are **more productive and less time consuming.**



templates are often completed individually, people flounder through questions and exercises they're ill-prepared to answer, their frustration building.

This approach is all about eliminating the unproductive parts. By helping people use what they already know and understand about an organization and its

# Integrate strategy planning with what drives day-to-day activities.

## 3

One problem with strategic planning: it's often completely separate from what happens on a day-to-day basis. When an organization's management mindset is that strategy is strictly for the long-term, it can result in a plan that contains only future initiatives with some vague, far-off completion date. Since the "future" never comes, the plan ends up reflecting only a few current activities.

Another issue: some organizations equate "strategic" with "all-inclusive," so people try to account for EVERYTHING the organization does now and will do in the future. Saddled with this level of detail, it's only a matter of time before the plan falls apart. An organization needs real-time flexing to function and succeed.

Building your process around collaborative group exercises and conversations gives participants a way to influence strategy and make sure the plan ties to important activities.



## Is It Strategic? (3-Question Quiz)

Determining what is strategic is about deciding whether something matters to the organization's success and demands being addressed with insight and innovation. And what matters for an organization can pertain to a variety of areas, including an organization's core purpose, values, vision, brand, key audiences, ability to satisfy customers, financial prospects, resource/raw material supplies, structure, or alignment.

To identify what is strategic in your organization, try this handy, three-question quiz. In just a minute or two, you can identify likely strategic initiatives and objectives.

- If we **don't** pursue this opportunity, will its absence be widely noticeable? **(Y/N)**
- If we **do** pursue it, will its impact be widely noticed? **(Y/N)**
- If we **ignore** the underlying situation or opportunity, will it create significant issues? **(Y/N)**

How many "yes" answers did you get?

Three means it's a safe bet you have a strategic issue on your hands. Two suggests a borderline strategic issue. One or fewer indicates you're probably not dealing with a strategic issue and can remove it from the list for now.

# Match strategy exercises to your business needs.

# 4

## Despite how helpful creative

thinking exercises are to strategy, creativity won't generate missing facts. That's why it's important to document relevant facts BEFORE getting a group together. Use online surveys, focused fact-finding exploration, and pre-session homework to pin down basic information. **This is vital, since nothing shuts down a planning session as quickly as a lack of key facts.**



There's no need to go overboard with this step. Instead, early on in the process, start preparing your strategic foundation and situation analysis updates by asking,

“What things still apply and are relevant for next year?” This helps focus your data-gathering efforts.

Sometimes the best strategic thinking approach involves a large, in-person group with opportunities for greater diversity of thinking. Smaller groups are ideal when you want to have more people actively generating ideas. In other cases, it's vital to ask questions one-on-one, whether via personal interview or survey. We go the one-on-one route in various situations, including ones in which we're seeking factual information, or in which the answer may vary based on who is in the room.

**We'd love to tell you that there's one formula for matching a group and situation to the ideal strategic thinking exercise.** But success depends on any number of factors. Sometimes it's easy to match the right exercises to the situation. Other times, you can anticipate the need to create a new strategic thinking exercise, and have it ready to go, even if you're trying it in an untested situation. And in other situations, you find that you need to adapt or even create a new exercise in real time. **The bottom line: stay open to the needs, skills, and challenges of the group as well as its individuals.**

# Pick planning steps that fit your organization's strengths.

# 5

## There is a fundamental sameness

to completing a strategic plan: you build a fact base and strategy foundation, explore the smartest ways to approach opportunities and handle threats, document the best, highest-probability ideas, and move on to successful implementation.

That said, you can streamline the process significantly by selecting the best steps to match your business situation.

When we developed the Brainzooming planning methodology, we were functioning as a strategic planning group inside a Fortune 300 company. As an internal resource driving a rapid-planning approach, we had no built-in bias to pad hours and require a complex set of planning steps.

**Everyone benefitted from our simplifying the process as much as possible.**

That's why we recommend mining planning outputs and strategy work you've already completed, to see how it can fit into future planning.

**We suggest exploring three areas for streamlining planning steps:**

1. Look at how many strategies and tactics you actually implemented from the last plan, and determine how deeply detailed the next plan should be.
2. Prioritize the time you invest in creating specific product / service marketing plans, based on each one's expected contribution to revenue and profit growth.
3. Review unimplemented strategies and tactics from the current plan and, if they're still sound, move them into the current year's plan to create a starting point for developing your strategy.

Rather than using a static planning process, try adapting the planning

process to your organization. This creates greater flexibility for participants, saving them time and hassle.





**Access your team's best ideas  
online without a single,  
"Sorry, go ahead!"**

**[info.brainzooming.com/blast](http://info.brainzooming.com/blast)**

Blast! is an innovative online experience where you and your team answer questions that propel you to impactful breakthroughs. Proven questions, candid responses, and your team's imagination create amazing results. There's no software to download. And it all gets done in 30 minutes. Yes, really. It's a whole new way to collaborate.

# HOW FUN & PRODUCTIVE STRATEGY PLANNING CAN SAVE \$200,000 IN EXECUTIVE TIME



**One planning formula is working amazingly well in virtual environments.**

In current client situations, the new formula that is working best for strategy planning involves online, keyboard-based collaboration:

- Participants respond to strategic thinking questions simultaneously and instantly see other participants' responses.
- For personal interaction, we may include a video call to see who's participating.
- Clients are typically opting for anonymous responses. Participants tell us that this makes them more eager to share challenging comments and new ideas.
- Since the collaboration platform records every keystroke, ideas and thinking are captured just as participants intended.

The net result of this strategy planning formula? Amazing productivity.

With everyone collaborating at once, twenty minutes of team input can easily translate to output comparable to a six-hour meeting.

**The savings formula from avoiding time-wasting strategy meetings.**

One client, who engaged Brainzooming to guide them in developing an all-online, multi-year growth strategy saved *three weeks of executive time* versus holding day-long, in-person strategy meetings.

Their actual participation time?

Seven hours of online collaboration, in ninety-minute meetings spread across multiple topics and days. The formula worked so well, the savings in people time from **keeping their executives out of three weeks of day-long meetings exceeded \$200,000!**

**The fast way to identify the formula for productive and fun strategy.**

Want to discuss ideas for your best strategy planning formula? A formula that engages your entire organization, saves time and money, and leads to results? Grab a thirty-minute meeting to chat or email me directly and share your situation and questions. We'll focus on what you are trying to accomplish and how to develop the best strategy to prepare you for what's ahead.

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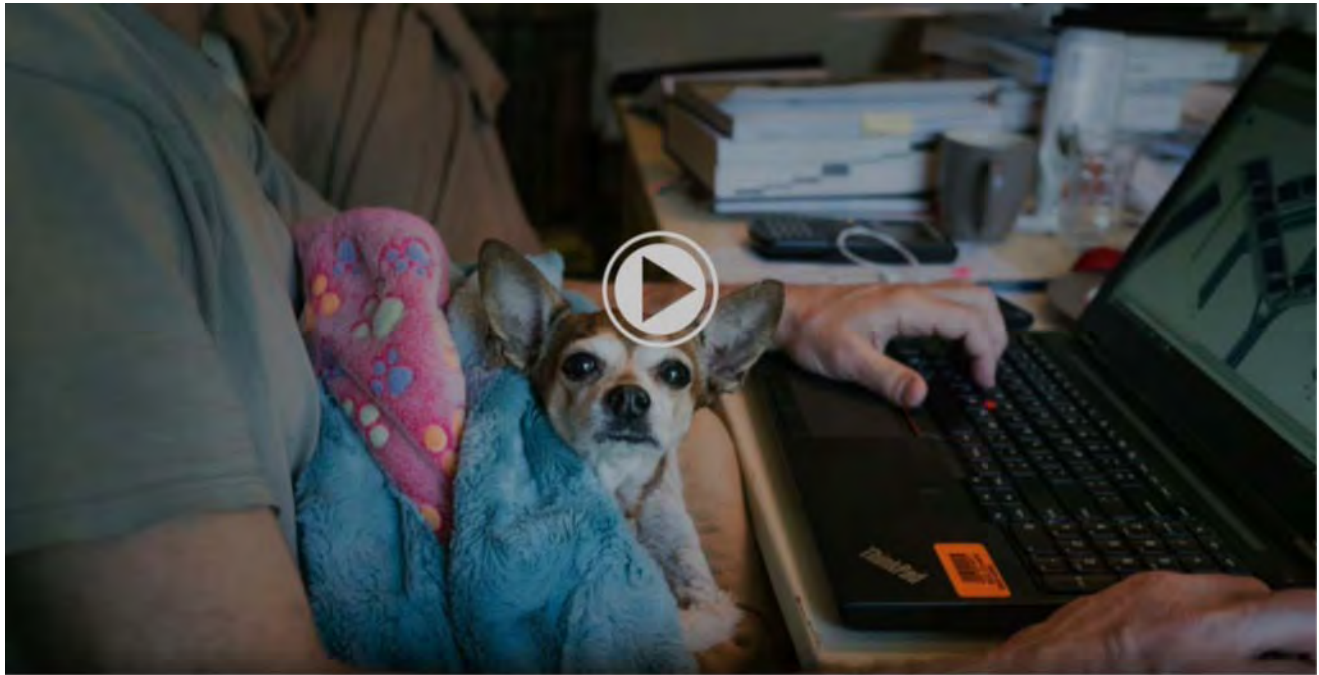




**Are you *positive* that your next strategy planning process will be smooth as you'd like?**

Scan the QR Code and book a free 30-minute meeting with Brainzooming founder, Mike Brown. We'll answer your questions to help get you prepped for smooth planning ahead.





There's a new, productive way to collaborate,  
no matter *where* your team is working from.



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