

## PM WORLD TODAY – PM TIPS &amp; TECHNIQUES – APRIL 2009

## The New Face of Strategic Planning: Bridging it with Project Management is the Key to Success

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With the current economy in crisis, businesses are scrambling to stay afloat. Many are abandoning their strategic, long term objectives for quick fixes and short-sighted survival tactics. Some of today's most popular business books from *The Tipping Point* to *Freakonomics* feature companies that have stumbled upon greatness without an ounce of strategic planning involved. And with the rapid evolution of real-time media, virtual offices and globalization, companies seemingly have to change their game plans on a daily basis to keep up.

This frenetic pace of work has rendered the often slow and cumbersome strategic planning process irrelevant. In fact, you could say the field of strategic planning is undergoing its own identity crisis. The Strategic Leadership Forum, the international professional association, has now been out of existence for several years. And few graduate schools offer strong strategic planning courses as a part of their curriculums.

But it's the failure to build a bridge between the strategic planning process and project management's planning process that is a major reason strategic plans don't work. When strategic planners and project managers work together from the beginning, strategic plans become more relevant, operational, realistic and implementable. They can then become one of a company's most useful tools for weathering tough economic times and staying ahead in today's fast-paced business environment.

### **The Disconnect**

The purpose of a strategic plan is to guide an organization intelligently into the future. Yet too many strategic plans cost a lot of money and merely collect dust. Why? Because there is a disconnect between the people creating the strategic plan and the people who are relied upon to implement it. Strategic planners fail to develop plans with the help of professional project managers—those who can better ensure that it is easily transformed into a working, successful operational plan.

This disconnect between the development and completion of a strategic plan results in huge cost overruns, delays in implementation, chaos in the workplace, and low worker morale. And, ultimately, it can lead to an organization's inability to achieve the vision that was painted in the strategic plan. The plan becomes unrealistic and unachievable.

What makes the project manager's participation so important from the beginning? Strategic planners have figured out how to take into account all views of the various stakeholders, how to include financial projections for each activity, how to set proper goals and objectives and even set timelines, milestones and target dates. However, the reason strategic plans are not "functional" is that they are created by a person or team who is neither a knowledgeable, certified or experienced project manager. The failure to get a project manager on the strategic planning team who understands the reality of managing complex projects is the single largest failure of the strategic planning industry.

### **Bring the Project Manager to the Table**

The project management industry must flex its growing muscle to get into and become effective at the strategic planning stage. Many CEOs resist this idea because they continue to think of the strategic planning stage as being "earlier" than the project management stage. Bringing project managers on from the beginning may appear to be a waste of time. But it's really quite the opposite.

To truly picture the difference between strategic planners and project managers, think of it this way: strategic planners are broad thinkers who soar at 30,000 feet. Project management professionals often work in the trenches, managing details and day-to-day nuances. They deal with the personnel, scheduling and IT issues that can push an unrealistic plan horribly off track, little by little. By putting strategic planners and project managers together to work on the strategic planning processes, they begin to fly at the same altitude. They can see what the other sees and can plan accordingly.

Some authors have suggested the term "strategic management" for this improved process. And it's a term that seems appropriate because it allows for a cross-functional and all-inclusive component that traditional strategic planning processes lacks. Strategic management would bring together strategic planners and project managers, whether they are at GE, DARPA or Harvard University.

### **The Art of "Strategic Management"**

We know that the best CEOs fly at both 30,000 feet and near the ground simultaneously. They create vision, strategy, and they require successful implementation. When they do their job best, they are both a strategic planner and a project manager.

The brilliance of Frank Lloyd Wright was that he was not only an immensely creative designer and architect; he was also a skilled electrical engineer, mechanical engineer, and materials/physics expert. The students he trained at Taliesin and Taliesin West had to go out and fetch the rocks and other natural materials they would use in their building projects. They would have to do their own wiring. They would have to learn deeply about the goals, traits and character of the people and organizations for whom they were designing buildings. By knowing how to develop an architectural plan, they were performing the role of a strategic planner. By

developing the specifications for the materials, the furniture, the uses of the space, the interior designs, the budgets, the tasks, the lighting, and creating the exact relationship of the building with the physical environment and the users of the building, Wright and his students took on the role of a project management professional.

This is the beauty of strategic management. The key is to consider every point of view, from the people leading the charge to the people doing the heavy lifting--and giving each role a voice in the process.

### **Getting it Right**

Integrating the strategic planning process and the project management process is not difficult, once everyone agrees it's worth doing. And it's important no matter how small or large a project is—whether it's planning a blood drive or planning a new enterprise level financial system. As more and more project managers successfully become involved earlier and earlier in the strategic planning process, strategic plans will become a more relevant and realistic part of business.

An evolutionary process needs to take place in order for the industry to embrace this thinking. Project managers will need to develop the political skills necessary to succeed as an intruder in the unfamiliar territory of strategic planning. At the same time, strategic planners will need to convince senior management of the need to add people with project management skills to the strategic planning team. But when done successfully, the worlds of strategic planning and project management can combine to produce strategic plans that guide organizations rather than collect dust.

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