

## Is It The Right Time to Plan?

By Sharon Danosky



Strategic Plans. Every organization should have one – right. Well, maybe not. Sometimes, it makes more sense to delay the planning process.

I am a huge advocate for planning. I believe there are so many benefits, beyond just charting a strategic direction for the organization. A good planning process fosters cohesion among the board. It can engage and energize both management and the board. It creates a shared vision. And it invigorates your organization with renewed purpose. In short, I really like and believe in strategic planning. If given my druthers, I would encourage the process nine times out of ten.

Over the past year, though, I actually came across a couple of instances where I just would not have advised an organization to embark on the planning process.

### **This made me ask – when is it not the right time to plan?**

Two scenarios come to mind. The first is when there is a high degree of uncertainty relative to a specific direction an organization is taking. In that case, I would advise an organization to take time to bring the matter to fruition before planning. For example, an organization might be considering a merger; be in the midst of a major transition, such as a long-term CEO who has decided to retire; or even be pursuing a specific objective that has not yet been resolved. In one case, an organization we were working with was pursuing accreditation – which could significantly change the direction depending on the outcome. Knowing the outcome prior to planning would definitely have impacted their strategic direction.

The second scenario would be when there are significant shifts in the financial under-pinning of the organization. One organization we worked with was discovering some financial improprieties, which precipitated an internal financial crisis, compounded by external funding shortfalls. In that instance, we advocated postponing the planning process. Other organizations may have just started or be in the midst of a capital campaign. Certainly planning for when the campaign ends is prudent, but in the midst of it can be more of a distraction than a benefit.

For a strategic plan to take hold and guide the organization, the organization needs to be on relatively stable footing without major distractions. Otherwise, the plan that is prepared will most likely start

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collecting dust on a shelf. By the time it is resurrected, the assumptions underlying the plan will probably have changed.

The other concern about being ready to plan isn't so much the plan, as it is the implementation. Once the planning is done – implementation needs to begin. And that is where the rub comes in.

A good strategic plan will lay out several key strategies. They are then followed by a series of action steps necessary to implement each strategy. Those action steps may be delegated to staff or, as I prefer to see, involve a joint process of staff and board working together to ensure both strategic direction and the impact that was intended.

If an organization is working through financial issues, going through a transition or is in the midst of implementing an initiative that could be transformational – quite simply, it has enough on its plate. Address those issues, get to a place where you are stable, take a breath ... and then start planning. It will turn out a lot better.

*(Refer to our prior posts on [What makes for a good strategic plan?](#); and [We Have a Strategic Plan, Now What?](#) And [Click here to see D&A's planning process](#))*