

# “Demonstrate, Educate and Promote”

## Sustainable Strategic Planning

Strategic Planning is your organization's process of defining your strategy, or direction, and making decisions on allocating your resources to pursue this strategy, including your capital and people.

“Sustainable Strategic Planning” is your organization's process of defining your strategy and making your decisions on allocating your resources to pursue this strategy including People, Planet and Profit.

“Sustainable Strategic Planning” is the formal consideration of your organization's future course. All Sustainable Strategic Planning deals with at least one of four key questions:

What do we do?

For whom do we do it?

How do we excel?

How can we avoid or beat competition?

In many organizations, this is viewed as a process for determining where an organization is going over the next year or more typically, 3 to 5 years, although some extend their vision to 20 years or more.

In order to determine where it is going, your organization needs to **know exactly where it stands**, then **determine where you want to go** and **how you will get there**. The resulting document is called the **"Sustainable Strategic Plan."**

There are many approaches to Sustainable Strategic Planning but typically a three-step process may be used:

**Situation**: evaluate the current situation and how it came about.

**Target**: define goals and/or objectives (sometimes called ideal state)

**Path**: map a possible route to the goals/objectives

One alternative approach is called **Draw-See-Think**

**Draw**: what is the ideal image or the desired end state?

**See**: what is today's situation? What is the gap from ideal and why?

**Think**: what specific actions must be taken to close the gap between today's situation and the ideal state?

**Plan**: what resources are required to execute the activities?

An alternative to the Draw-See-Think approach is called **See-Think-Draw**

**See**: what is today's situation?

**Think**: define goals/objectives

**Draw**: map a route to achieving the goals/objectives

In the past, Various business analysis techniques have been used in Strategic Planning, including SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats ), PEST analysis (Political, Economic, Social, and Technological analysis), STEER analysis (Socio-cultural, Technological, Economic, Ecological, and Regulatory factors) and EPISTEL (Environment, Political, Informatic, Social, Technological, Economic and Legal).

Personnaly, I would prefer an analysis that incorporates a very complete approach with People, Planet and Profit in mind (Refer to the Triple Bottom Line Principles):

Have a **Sustainable Strategic Plan** with

- . an **Environmental** Approach

- . a Sustainable **Engagement** Process

and have People committed to this Sustainable Strategic Plan

- . a Sustainable **Marketing** Process  
and build your sales
- . a Sustainable **Accounting** Process  
and have your expenses budgeted
- . a Sustainable **Purchasing** Process  
and have your expenses under control

Now not only are you planning how to become more **Profitable** but also more **Sustainable** at the same time!

This is **Economical!**

This “**Sustainable Strategic Plan**” analysis is called a **SEEMAP analysis:**

A Strategic Plan that incorporates:

**Sustainability** for healthy People, healthy Business and a healthy Planet

**Environmental** benefits for Planet

**Engagement** with People

**Marketing** for the Profit part

**Accounting** for the Profit part

**Purchasing** for the Profit part

It is also true that Strategic Planning may be a tool for effectively plotting the direction of a company; however, Strategic Planning itself cannot tell in advance exactly how the market will evolve and what issues will surface in the future in order to plan your organizational strategy. Therefore, strategic innovation and tinkering with the “**Sustainable Strategic Plan**” have to be a cornerstone strategy for an organization to survive the turbulent business climate; also you will be less vulnerable to abrupt changes in today’s world!

**First:**

## Share your Sustainable Vision and ideals:

Your Vision and Ideals should be supported with an effective Vision or Mission Statement. It is the source of inspiration and tells people why it is important to understand the Vision and achieve the Mission.

**Vision:** Defines the desired or intended future state of an organization or enterprise in terms of its fundamental objective and/or strategic direction. Vision is a long term view, sometimes describing a view of how the organization would like the world in which it operates to be. For example: a Business working with Sustainability in mind might have a vision statement that reads:

**"Our Vision is to create a better world for tomorrow "**

A Vision statement outlines what the organization wants to be, or how it wants the world in which it operates to be. It concentrates on the future. It is a source of inspiration. It provides clear decision-making criteria.

**Mission:** Defines the fundamental purpose of an organization or an enterprise, basically describing why it exists and what it does to achieve its Vision. A corporate Mission can last for many years, or for the life of the organization. It is not an objective with a timeline, but rather the overall goal that is accomplished over the years as objectives are achieved that are aligned with the corporate mission.

**"Our Mission is to create a Business which is Economical: a Sustainable and Profitable one "**

A Mission statement tells you the fundamental purpose of the organization. It defines the customer and

the critical processes. It informs you of the desired level of performance.

**More about vision statements and mission statements:**

Organizations sometimes summarize goals and objectives into a mission statement and/or a vision statement, while others begin with a vision and mission and use them to formulate goals and objectives.

While the existence of a shared mission is extremely useful, many strategy specialists question the requirement for a written mission statement. However, there are many models of strategic planning that start with mission statements, so it is useful to examine them here.

An advantage of having a statement is that it creates value for those who get exposed to the statement, and those prospects are managers, employees and sometimes even customers. Statements create a sense of direction and opportunity. They both are an essential part of the strategy-making process.

Many people mistake a vision statement for a mission statement, and sometimes one is simply used as a longer version of the other. The Vision should describe why it is important to achieve the Mission. A Vision statement defines the purpose or broader goal for being in existence or in the business and can remain the same for decades if crafted well. A Mission statement is more specific to what the enterprise can achieve itself. Vision should describe what will be achieved in the wider sphere if the organization and others are successful in achieving their individual missions.

A mission statement can resemble a vision statement in a few companies, but that can be a grave mistake. It can confuse people. The mission statement can galvanize the people to achieve defined objectives, even if they are stretch objectives, provided it can be

elucidated in SMART (Specific, Measurable, Achievable, Relevant and Time-bound) terms.

A mission statement provides a path to realize the vision in line with its values. These statements have a direct bearing on the bottom line and success of the organization.

Which comes first? The mission statement or the vision statement? That depends. If you have a new start up business, new program or plan to re-engineer your current services, then the vision will guide the mission statement and the rest of the strategic plan. If you have an established business where the mission is established, then many times, the mission guides the vision statement and the rest of the strategic plan. Either way, you need to know your fundamental purpose – the mission, your current situation in terms of internal resources and capabilities (strengths and/or weaknesses) and external conditions (opportunities and/or threats), and where you want to go – the vision for the future. It's important that you keep the end or desired result in sight from the start.

Features of an effective vision statement include:

- Clarity and lack of ambiguity
- Vivid and clear picture
- Description of a bright future
- Memorable and engaging wording
- Realistic aspirations
- Alignment with organizational values and culture

To become really effective, an organizational vision statement must (the theory states) become assimilated into the organization's culture. Leaders have the responsibility of communicating the vision regularly, creating narratives that illustrate the vision, acting as role-models by embodying the vision, creating short-term objectives compatible with the vision, and encouraging others to craft their own personal vision

compatible with the organization's overall vision. In addition, mission statements need to be subjected to an internal assessment and an external assessment. The internal assessment should focus on how members inside the organization interpret their mission statement. The external assessment — which includes all of the businesses stakeholders — is valuable since it offers a different perspective. These discrepancies between these two assessments can give insight on the organization's mission statement effectiveness.

Another approach to defining Vision and Mission is to pose two questions. First:

**"What aspirations does the organization have for the world in which it operates and has some influence over?"**

and continuing on from this:

**"What can the organization do or contribute to fulfill those aspirations?"**

The succinct answer to the first question provides the basis of the Vision Statement. The answer to the second question determines the Mission Statement.

Second:

Set the Foundation by clearly establishing the values and other principles:

Those are the framework of your Organization, your Entity, your Business; you cannot do anything without it. It is the same for a Family or Local Community.

Values: Beliefs that are shared among the stakeholders of an organization. Values drive an organization's culture and priorities.

**"We believe that there is a healthy relationship that exists between ecology and economics'**

Third:

## Define the Strategies.

Define the “**Sustainable Strategies**” using “**Sustainable Strategic Planning**”: This is the Organization’s future course strategies with the allocation of resources. It is a plan of action designed to show how to achieve an Objective, and accomplish an achievement; an achievement is the combination of intelligence and motivation.

### Perform a situational analysis:

When developing strategies, an analysis of the organization and its environment as it is at the moment and how it may develop in the future, is important.

**The analysis has to be executed at an internal level as well as an external level to identify all opportunities and threats of the external environment as well as the strengths and weaknesses of the organizations.**

There are several factors to assess in the external situation analysis:

Markets (customers)

Competition

Technology

Supplier markets

Labor markets

The economy

The regulatory environment

It is rare to find all seven of these factors having critical importance. It is also uncommon to find that the first two – markets and competition – are not of critical importance (Bradford "External Situation – What to Consider").

Analysis of the external environment normally focuses on the customer:

**Management should be visionary in formulating customer strategy**, and should do so by thinking about market environment shifts, how these could impact

customer sets, and whether those customer sets are the ones the company wishes to serve.

Analysis of the competitive environment is also performed, many times based on the framework suggested by Michael Porter.

**Define the Objectives or the Ideal State:  
Define goals and/or targets.**

Strategic planning is a very important business activity. It is practiced widely informally and formally. Strategic planning and decision processes should end with objectives and a roadmap of ways to achieve those objectives.

The following terms have been used in strategic planning: desired end states, plans, policies, goals, objectives, strategies, tactics and actions. Definitions vary, overlap and fail to achieve clarity. The most common of these concepts are specific, time bound statements of intended future results and general and continuing statements of intended future results, which most models refer to as either goals or objectives (sometimes interchangeably).

One model of organizing objectives uses hierarchies. The items listed above may be organized in a hierarchy of means and ends and numbered as follows: Top Rank Objective (TRO), Second Rank Objective, Third Rank Objective, etc. From any rank, the objective in a lower rank answers to the question "How?" and the objective in a higher rank answers to the question "Why?" The exception is the Top Rank Objective (TRO): there is no answer to the "Why?" question. That is how the TRO is defined.

People typically have several goals at the same time. "Goal congruency" refers to how well the goals combine with each other. Does goal A appear

compatible with goal B? Do they fit together to form a unified strategy? "Goal hierarchy" consists of the nesting of one or more goals within other goal(s).

One approach recommends having short-term goals, medium-term goals, and long-term goals. In this model, one can expect to attain short-term goals fairly easily: they stand just slightly above one's reach. At the other extreme, long-term goals appear very difficult, almost impossible to attain. Strategic management jargon sometimes refers to "Big Hairy Audacious Goals" (BHAGs) in this context. Using one goal as a stepping-stone to the next involves goal sequencing. A person or group starts by attaining the easy short-term goals, then steps up to the medium-term, then to the long-term goals. Goal sequencing can create a "goal stairway". In an organizational setting, the organization may co-ordinate goals so that they do not conflict with each other. The goals of one part of the organization should mesh compatibly with those of other parts of the organization.

Define the Objectives, write down those goals with clear topics and give specific metrics to these targets and/or projects. A Target is also the object of a Goal accomplishment; Those Objectives should be SMART (Specific, Measurable, Achievable, Relevant and Time-bound).

#### **Fourth:**

**Implement the Tactics.**

**Define the Tactics and Action Tasks.**

**By definition the Tactics are the Implementation of the Strategies. They are the course of Action followed in order to achieve an immediate or short-term Objective, Goal or Target. It is a specific approach.**

By definition an Action is the doing of something; it is the state of being working, an act or thing done, a behavior and habitual conduct or behavior.

By definition, a Task is part of a set of actions which accomplish an assignment, a job or a problem; it is an activity that needs to be accomplished within a defined period of time. An assignment is a Task under the responsibility of an assignee which should have a start and end date defined. One or more assignments on a task put the task under execution. Completion of all assignments on a specific task should claim the task as completed. Tasks can be linked together to create dependencies.

**Formulate specific Action Tasks and Processes to be taken to attain these Objectives.**

It is where you use the “**Light Green**” or the “**Dark Green**” approaches; the “**Light Green**” approach involves a lower-budget and a more behavioral focus that can still save significant costs, while a “**Dark Green**” approach involves a larger budget and a more aggressive attitude that can yield major savings and generate even more profit.

**Define and show the map of the possible route to reach those Objectives, Goals, Targets...; This is your Roadmap to success.**

**Agree of these Action Tasks, Processes and Roadmap.**

**Make a Plan, an Action Plan.**

**Monitor and get feedback from implemented Processes to fully control the operation.**

**Fifth:**

## Measure, Evaluate and Recognize.

You need to measure how much your Business could achieved, Evaluate your “Sustainable Strategic Planning” and Recognize the people who help your business to reach those achievements.

### Example

#### **First:**

#### Share your Sustainable Vision and ideals.

Your Vision and Ideals should be supported with an effective Vision or Mission Statement. It is the source of inspiration. It tells people why it is important to understand the Vision and achieve the Mission.

#### **Example:**

"Our Vision is to create a better world for tomorrow "

"Our Mission is to create a Business which is Ecological: a Sustainable and Profitable one "

#### **Second:**

#### Set the Foundation by clearly establishing the values and other principles.

Values: Beliefs that are shared among the stakeholders of an organization. Values drive an organization's culture and priorities.

#### **Example:**

"We believe that there is an healthy relationship that exists between ecology and economics'

#### **Third:**

#### Define the Strategies.

Define the “Sustainable Strategies” using “Sustainable Strategic Planning”: This is your Organization’s future course strategies with the allocation of resources.

## **Example:**

### **Define**

**“Our Objective is to reduce greenhouse gas emissions by promoting energy savings and practicing pollution prevention; also we will demonstrate and educate our customers, vendors, sponsors and other non-profit organizations about the importance of doing it”**

**“Our Objective is to show Businesses how to drive active consumer participation by using a Loyalty and Rewards Marketing Program”**

### **Short Term Objective (Within the first Year):**

**Demonstrate that a Business can reduce its energy usage, electric and natural gas by 25% by using a “Light Green approach”**

**The “Light Green” approach involves a lower-budget and a more behavioral focus that can still save significant costs.**

**Demonstrate that a Business will Acquire and Retain more customers, by 3%, by using a Loyalty and Rewards Marketing Program”**

### **Medium Term Objective (Within 3 Years):**

**Demonstrate that a Business can reduce its energy usage, electric and natural gas by 50% by using a “Dark Green approach”**

**A “Dark Green” approach involves a larger budget and a more aggressive attitude that can yield major savings and generate even more profit.**

**Demonstrate that a Business will Acquire and Retain more customers, by 5%, by using a Loyalty and Rewards Marketing Program”**

### **Long Term Objective (Within 7 Years):**

**“Demonstrate that Businesses can reduce greenhouse gas emissions by saving energy usage and prevent pollution”**

**“Demonstrate that a Business will Acquire and Retain more customers, by using a Loyalty and Rewards Marketing Program”**

**“By saving energy usage and prevent pollution, a Business will be able to be more Sustainable, reduce its operational costs and by acquiring and retaining more customers a Business, will be able to build sales; by reducing costs and building sales a Business will become more Profitable, it will become more Ecolonomical!”.**

#### **Fourth:**

#### **Implement the Tactics.**

**Define the Tactics and Action Tasks. By definition the Tactics are the Implementation of the Strategies. They are the course of Action followed in order to achieve an immediate or short-term Objective, Goal or Target. It is a specific approach.**

#### **Example:**

#### **Electricity**

#### **Light Green Tips:**

#### **Do**

- . Eliminate phantom electrical loads
- . Unplug appliances not in use
- . Set computers to energy saver mode
- . Lease an “Efficient Electronic Sign” for your

**Business**

#### **Dark Green Tips:**

#### **Do**

- . Buy “Energy Star” rated appliances for your Home
- . Buy “Energy Star” rated equipment for your

**Business**

#### **Natural Gas**

**It is considered a clean source of energy when the equipment which is using it is in good working condition.**

### Light Green Tips:

Do

- . Use your equipment only when necessary
- . Keep your equipment in very clean condition
- . Contract the services of professional maintenance

company

### Dark Green Tips:

Do

- . Whenever feasible, invest in a high efficiency option

### Fifth:

#### **Measure, Evaluate and Recognize.**

You need to measure how much your Business could achieve, evaluate your “Sustainable Strategic Plan” and recognize the people who help your business to reach those achievements.

#### Example:

**Achievements:**

Electric usage reduced by 34% the first Year

**Remember: If “Location, location and location” is for Real Estate, “Timing, timing and timing” is for Electricity!**

Natural Gas usage reduced by 31% the first Year

**Remember: Saving gas is just about creating new habits!**

Pollution prevented by having the Equipment properly repaired and maintained by a professional maintenance company

**Remember: You can budget for your preventive maintenance costs, but you cannot predict when you’ll have to pay for a breakdown!**

Employees and managers who have been part of the success of these achievements will be thanked individually, will receive a bonus check and will have a

special party organized for them and their families where recognition awards will be presented.

The Business will decrease its operational costs by 4.1% and will increase its sales by 3% from last Year.

The Customers, Vendors, sponsors and other non-profit organizations have been educated about the importance of becoming Sustainable and Profitable.

**It is Ecolonomical!**

### **Some Definitions:**

Being “**Sustainable**” implies reducing the environmental impact from the manufacturer to the product user.

“**Strategy**” is the art of utilization of the mind in order to achieve success; it is a long term action plan for achieving an objective and/or to accomplish an achievement

The “**Tactics**” are the implementation of the Strategy, it is a short term action to do in order to solve a specific problem, to achieve a specific Objective and/or to accomplish an achievement; They are the course of Action followed in order to achieve an immediate or short-term Objective, Goal or Target. It is a specific approach.

An “**Objective**” is an intended conscious result to attain or action to accomplish by an Organization or a Business.

An “**Achievement**” is a final accomplishment of an act after going through processes which have been made with effort and often in spite of obstacles and discouragements; it is an idealistic task which combines intelligence and motivation.

A “**Plan**” is typically any procedure used to achieve an Objective. It is a set of intended actions, through which one expects to achieve a goal.

**“Planning”** it is a plan of action designed to show how to achieve an Objective or to accomplish an achievement; in Organizations and Businesses it is both: the organizational process of creating and maintaining a plan and the psychological process of thinking about the activities required to create a desired Objective on some scale. As such, it is a fundamental property of intelligent behavior.

**“Sustainable Strategic Planning”** is the Organization’s or Business’ future course strategies with the allocation of resources, including capital and people. It is a plan of action design to show how to achieve an Objective and/or to accomplish an achievement.

As a conclusion, let’s resume **the 5 steps** of a **“Sustainable Strategic Plan”** (Think **SEDIMER**):

- . **Share your Vision** and Ideals  
with a Vision and/or Mission Statement
- . **Establish your Values** and Principles  
with a Core Values Statement
- . **Define your Strategies**  
with a short term Sustainable Strategic Plan (1 to 3 years)  
with a medium term Sustainable Strategic Plan (3 to 7 years)  
and with a long term Sustainable Strategic Plan (7 to 20 years)
- . **Implement the Tactics**

with a short term Sustainable Action Plan (Tactical Plan for 12 months minimum up to 24 months maximum)

**. Measure, Evaluate and Recognize**

follow-up, report and review numbers with Trackers, Expense Budget, Sales Projections, Profit & Loss Statement, short term Business Plan, Yearly Planner, and other Documents related to your Business

follow-up, review and reward performance for results reached and tasks completed with your Staff, Employees, Key Employees and Managers

follow-up, review and reward performance for behavioral improvement achieved with your Staff, Employees, Key Employees and Managers

In conclusion, understanding Strategic Planning is a matter of utilizing a step by step methodical process as well as the definitions of the language used.

(for the purposes of this guide, the definitions detailed in this section were primarily taken from Wikipedia)

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**“Because Ecology means Business”**

