Let's face it, most people spend their days in chaotic, fast-paced, time- and resource-strained organizations. Finding time for just one more project, assignment, or even learning opportunity—no matter how career enhancing or useful—is difficult to imagine. The 10 Steps series is designed for today's busy professional who needs advice and guidance on a wide array of topics ranging from project management to people management, from business planning strategy to decision making and time management, from return on investment to conducting organizational surveys and questionnaires. Each book in this new ASTD series promises to take its readers on a journey to basic understanding, with practical application the ultimate destination. This is truly a just-tell-me-what-to-do-now series. You will find action-driven language teamed with examples, worksheets, case studies, and tools to help you quickly implement the right steps and chart a path to your own success. The 10 Steps series will appeal to a broad business audience from middle managers to upper-level management. Workplace learning and human resource professionals along with other professionals seeking to improve their value proposition in their organizations will find these books a great resource.
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Buy This Book
Most successful organizations practice strategic planning. These organizations benefit not only from having a plan, but also from the planning process itself. The plan is the road map to success, and the planning process unites organizational leadership and enhances the communicating of critical company information. Today’s volatile marketplace demands that employees, work groups, and organizations have a clear understanding of their roles, the products and services they offer, and the processes they use to navigate the continually changing waters they sail. A strategic plan that is directly related to group and individual planning provides an opportunity to create an outcome-based organization culture.

In the face of rapid change, organizations have realized they cannot compete on a global basis without a strategic plan that encourages innovation and creates knowledge internally and that builds customer loyalty to their products and services. A strategic plan provides the path an organization will take in the future (whether it will stay on course or follow a different direction than in the past); the predictions of how the marketplace, customer base, and product line will change or react to the future; and the calculated risk that the organization will need to bear to move in that direction. During strategic planning, organizations set their priorities for the next two to five years and identify how major resources will be allocated. If done correctly, the strategic plan should be a document that motivates employees to achieve the plan’s stated goals and tactics. When realignment or redirection takes place, it is the strategic plan that explains the change in direction and refocuses the organization’s efforts by redefining the organizational goals and major tactics.

But how do you develop a successful plan? The 10 Steps to Successful Strategic Planning is process driven and comprises the following 10 steps:

1. laying the foundation for the plan
2. scanning the business environment
3. collecting relevant data
4. analyzing collected data
5. stating mission, vision, and values
6. prioritizing needs and identifying risks
7. designing and validating tactics
8. prioritizing tactics and resources
9. documenting and communicating the plan
10. maintaining the plan.

Strategic planning provides a plethora of opportunities for an organization, such as facilitating discussion and analysis of past performance using a methodical approach, providing a method to prioritize performance needs and organization goals, supplying information that will assist in prioritizing resources, and enabling the organization to be proactive rather than reactive and therefore more in control. Developing a plan will enable your organization to

- ensure the products and services delivered to its customer base are consistent and of high quality
- appraise past performance and identify successes and areas for future improvement
- create a consistent, sharp marketing message that promotes realistic expectations about the organization
- promote better use of resources (people, things, time, and finances)
- manage customer expectations
- limit resource investment in activities that do not provide results
- encourage individuals to be more proactive and resourceful in problem solving through understanding how the strategy affects their responsibilities and accountabilities
- resolve internal performance problems by clarifying expectations and standardizing performance
- strengthen its culture by motivating employees to embrace professional ethics and practices.

The uses of a strategic plan vary as much as one organization varies from another. Organizations use strategic plans to direct business planning, to allocate funding during budgeting, to communicate with em-
ployees, to form the basis for new-employee orientation materials, and to aid individual performance planning, among many other uses. Because a strategic plan is the foundation for the organization’s future it should be used for organizational performance planning and evaluation, goal setting and assessment, communication, and financial planning.

10 Steps to Successful Strategic Planning is part of the 10-Step Series and was written to provide you with a proven process and tool set to create a strategic plan. We hope that the tools contained in this book will guide you each step of the way in building a successful strategy. As you implement the strategic plan, you and your organization will continue to benefit from your strategic thinking.

Susan Barksdale and Teri Lund
November 2006
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Mistakes are costly—so costly they can force out of business an organization once seen as an industry leader and powerhouse. Strategic plans help alleviate mistakes because they support a company’s ability to

- apply resources where they are needed and “ignore” practices that don’t need to be changed
- prioritize needs and tactics in a way that provides more benefit for the cost
- evaluate realistically if a tactic can be achieved within the timeframe identified and with the resources that were to be allocated
- examine internal and external forces and business drivers that will affect the organization’s customers, products, and, ultimately, its business practices
- link the identified goals with the tactics it will take to achieve those goals.

This book, 10 Steps to Successful Strategic Planning, provides a framework to use in developing a strategic plan quickly and efficiently. This book outlines a practical process and offers methods and tools that you can use to develop a strategic plan in a short timeframe. Case examples in every chapter illustrate each step in the process and show how other companies have approached the
process. The case studies feature organizations of various sizes and styles—perhaps one just like yours.

Use whichever parts of this book you need. For example, if you are in the midst of creating a strategic plan, you can focus on articulating the mission, vision, and values of the strategic plan, identified in Step 5. Or if you have already collected the data and must analyze them quickly and meaningfully, you can use the methods and tools outlined in Step 4: Analyzing the Collected Data.

This book, 10 Steps to Successful Strategic Planning, brings you the proven and current techniques for strategic planning; it makes specific methods, case examples, checklists, worksheets, and other tools available for immediate use in your organization. Most important, it helps you develop a plan that provides direction and guidelines quickly. This workbook will show you how to

- create a strategic plan to guide the initiatives and tactics in your organization that will meet organizational goals and objectives
- enhance others' involvement in the planning effort
- formulate a practical process for developing a strategic plan for organizations and individual departments or units
- use methods, tools, and outlines for developing a strategic plan
- create a culture that encourages employees to become strategic business partners
- integrate trends and new tactics into your strategic planning process.

Target Audiences

Organization leaders and others who are responsible for initiating and leading the development of a strategic plan, whether for the whole organization or a department or unit, will find this book most valuable.

If your job involves strategic planning, and you are interested in quickly providing direction to your team, aligning your services
and products with your organization’s business, and being able to
market what you offer to management, employees, your customers,
and your business partners, then 10 Steps to Successful Strategic
Planning is for you. Whether your organization is one of the
Fortune 100, a not-for-profit, or a small startup, the tools and work-
sheets provided here will decrease the time and effort needed to de-
velop a strategic plan.

Structure of the Workbook

This workbook will help you get the strategic planning process
done quickly and successfully. Each section describes one of the 10
specific steps for creating a performance-driven strategy. Here is an
overview of the 10 steps as presented in the workbook:

◆ Step 1: Laying the Foundation addresses why strategic
planning is important, and includes tools to define the
scope of the plan; identify outcomes, goals, and objectives;
and determine a plan development timeline. Identifying
key participants, mapping sponsorship, gaining commit-
ment, and initiating the marketing for the plan are also
addressed in this step.

◆ Step 2: Scanning the Business Environment kicks off the
strategic plan development. Included are tools for scanning
the business environment and questions to use in gather-
ing necessary information. This step also covers a process
for identifying current and future business drivers.

◆ Step 3: Collecting Relevant Data explains why it’s crucial
that you gather germane data before you develop a func-
tional strategy. Tools and tables that provide types of data,
data sources, and uses for the data collected are supplied
in this step, as is a process for planning your data gather-
ing and for using preexisting information sources. Finally,
there are tools to help you determine the validity and reli-
ability of the collected data.

◆ Step 4: Analyzing the Collected Data addresses how to
examine the data collected for the strategic plan and fo-
cuses on coding and sorting data and completing calculations. Tools and worksheets help you assemble and review the data and determine if the key findings are valid.

- **Step 5: Stating Mission, Vision, and Values** emphasizes the importance of defining mission, vision, and values statements as part of your strategic planning. We’ve included guidelines for creating your statements and for setting organization objectives.

- **Step 6: Prioritizing Needs and Identifying Risks** explains how to establish criteria for ranking business needs and identify risks so you can define the tactics you’ll pursue. Included in this step are tools to help rank-order alternatives and to manage risks, and there is a decision matrix that will make it easier to choose the tactics for your plan.

- **Step 7: Designing and Validating Tactics** shows you how to evaluate your possible tactics to ensure their compatibility with the mission and company objectives you’ve established. The tools and worksheets in this step help you identify desirable business outcomes and measures to ensure success. You’ll discover a process to align your chosen tactics with your plan’s original scope and objectives. How to create a tactical plan and assign executive accountability also are addressed.

- **Step 8: Prioritizing Tactics and Resources** provides tools to help you define the resources your tactics demand and determine when those resources will be needed to deliver your tactics.

- **Step 9: Documenting and Communicating the Plan** offers a plan outline along with tips for documenting the plan. You’ll also find helpful our six-step process for creating and initiating a communication strategem.

- **Step 10: Maintaining the Plan** discusses the importance of keeping the plan current and defines the maintenance steps and actions that accompany those steps. In this step we also give you a process for forecasting the timeline and the personnel you will need to maintain your plan.
STEP ONE

Laying the Foundation

OVERVIEW

Defining the scope
Identifying outcomes, goals, and objectives
Setting the timeframe
Choosing key players
Mapping advocacy

What is the future of the organization? What practices and procedures will be necessary for operating in the future? What issues face the organization? How does the organization communicate its vision, mission, strategic goals, and tactics to its employees, partners, customers, and stakeholders? How and when are important decisions made? Whether an organization is large or small, for profit or not-for-profit, volunteer-based, academic, or governmental, a strategic plan should answer these questions.

A strategic plan is central to a company’s ability to make critical business decisions and is the springboard for operational planning. It serves as a communication vehicle for the company’s mission, vision, values, and long-term objectives; and it inspires and excites employees, customers, partners, shareholders, and others about the organization as it operates today and where it is headed in the future. A strategic plan directs and predicts how the customer base and product line will react or change in the future, and it identifies risks the organization will have to bear if it’s to move in the desired direction.
During the strategic planning process, organizations usually set priorities for the next two to five years and identify how major resources will be allocated. If done correctly, a strategic plan will motivate employees to achieve the company’s goals. When organizational realignment or redirection takes place, a strategic plan explains the change in direction and refocuses the organization’s efforts by redefining organizational goals and tactics.

An organization’s business plan takes the initiatives and tactics borne of the strategic plan and drills down to operational details to identify how the company’s goals and objectives will be met. The strategic plan drives the business plan, and the business plan in turn dictates the management functions of the organization—how marketing, finance, human resources, and other areas will achieve the outcomes identified in the strategic plan. In other words, the business plan translates the strategic plan into action.

The first step in 10 Steps to Successful Strategic Planning is to lay the foundation for developing a strategic plan. In this step you’ll find the information, tools, and worksheets to help you initiate the planning process. These are the topics we’ll cover:

- defining the plan’s scope
- identifying plan outcomes, goals, and objectives
- determining the timeframe for developing the plan
- identifying key participants in developing the plan
- mapping advocacy for the plan
- gaining commitment for developing the plan
- initiating the marketing of the plan.

Let’s consider three case examples to show how the first step in strategic planning operates in a range of organizations.
Case Examples: Laying a Foundation

Our examples show how a technology company, a not-for-profit organization, and a human resource (HR) department used the first step in the 10-step process to initiate their strategic planning efforts.

Kicking Off the Process at an Established Tech Firm

New Technology is a Fortune 500 company that supplies technology through a network of franchises and resellers who serve end users. The firm has a strategic plan that is a little more than two years old, but senior management believes that changes in technology and the marketplace demand a new strategy, and employee satisfaction surveys have indicated a need for strategic reevaluation. Earlier employee surveys and a review of the marketplace have shown that employee service levels are declining with employee satisfaction, and customer satisfaction is suffering as a result. The organization is quickly losing market share to its competitors. Is employee dissatisfaction the only reason? A reformulated strategic plan has to address these issues and identify what is needed to revitalize the organization.

By following the activities suggested in Step 1, New Tech is able to identify these three desired outcomes for the strategic plan:

1. Determine what the company needs to do to become technically competitive.
2. Determine if employee dissatisfaction is the only factor in the decrease in customer satisfaction, or if there are other contributing factors.
3. Strengthen its understanding of what the competition is doing to increase its customer and employee satisfaction.

Setting the Stage for Successful Planning

Art on the River is a grassroots event-based effort to raise money for programs to benefit children in the local area. In the past, no
thought was given to the future of Art on the River, but this year a charitable foundation has offered to match the funds raised through the organization's event. Realizing that this takes the event to a new level, a member of the steering committee has suggested creating a strategic plan that looks at how funds were allocated this year and how they should be allocated in the future. Once the members of the steering committee grasped the benefits of strategic planning, they understood that their event needed a well-defined scope to assist in raising and allocating funds.

By defining their intended outcomes, goals, and objectives early on, they were able to excite several foundations into contributing to Art on the River and working as business partners in establishing its final strategic plan.

Starting to Plan at the Department Level

ThoughtWare manufactures components that support e-technology. Its HR department provides training to the end-use customer who buys ThoughtWare's products. The company has gone through a major reorganization as part of its new strategic plan and has dramatically changed the product line it offers its customers. As a result, the HR group is uncertain who its customer is and how it can best support the business in the current environment. After an initial two-hour strategy-planning meeting, HR planning leaders have identified a set of questions to put before ThoughtWare's executives. The answers to these questions will help gain advocacy for HR's department-level strategic plan and will provide additional information that the planning team can use to successfully create its strategic goals.

Defining the Scope

The first action in strategic planning is defining the scope of the plan. Questions such as, What outcomes are desired as a result of this strategic planning effort? and, What results do we really want to achieve? need to be answered.
This may require an examination of the current environment (to be discussed in more detail in later steps), or information may be available from customer surveys, market data, and other resources. However the information is acquired, planners must collect and analyze statistics and make a decisive effort to identify plan priorities. When the outcomes and priorities are identified, the goals and objectives of the plan can be established. This is a crucial component of the strategic planning process because the goals and objectives will determine where the effort should be concentrated and who needs to be involved. This also will affect the timetable and, ultimately, the tactics of the plan.

It is important to understand these two things: (1) strategic planning is not a reaction to the environment but an attempt to shape the future; and (2) using the information you have on hand will help determine priorities that will shape your entity into the organization, group, or department you want it to become. This effort will define the direction the organization will take generally, and the direction the departments and groups will take specifically. Ultimately, it will define what individual workers should do to make the company successful. A completed strategic plan frequently is the basis for funding, operational, or business planning, and for growth and management planning.

Planning Outcomes, Goals, and Objectives

Table 1.1 presents the outcomes, goals, and objectives for three organizations (financial services, health care, and technology) and
<table>
<thead>
<tr>
<th>Organization</th>
<th>Outcome</th>
<th>Goal</th>
<th>Objective</th>
<th>Group</th>
<th>Outcome</th>
<th>Goal</th>
<th>Objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial services organization</td>
<td>To have a plan for a more profitable customer base</td>
<td>To reduce the cost per customer</td>
<td>To increase the number of relationships/customers by more than 10 percent while ensuring that customer satisfaction remains the same</td>
<td>Marketing department of the financial services organization</td>
<td>To have a plan to support increasing customer relationships</td>
<td>To set up a marketing program aimed at increasing customer relationships</td>
<td>To establish new relationships with current customers and decrease the cost per customer by 15 percent in the first quarter</td>
</tr>
<tr>
<td>Health-care organization</td>
<td>To have a plan to meet nurses’ union concerns</td>
<td>To decrease safety concerns for the nurses</td>
<td>To increase safety training that directly relates to injury claims by more than 50 percent</td>
<td>HR department of the health-care organization</td>
<td>To have a plan for safety training for the nurses</td>
<td>To develop a training program for nurse safety</td>
<td>By June, to launch a pilot program for nurse safety training that reduces injury claims by at least 50 percent</td>
</tr>
<tr>
<td>Technology organization</td>
<td>Finance department of the organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------</td>
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<td></td>
</tr>
<tr>
<td>To have a plan that increases cost/budget accountability by 90 percent for staying within budget after implementing a new system for budgeting</td>
<td>To implement a system to help managers increase cost/budget accuracy by 90 percent through a new reporting system, which will be tested and implemented before the next budgetary cycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To have a plan for a new budget that increases cost/budget accuracy</td>
<td>To increase cost/budget accuracy by providing new budget and reporting system, which will be tested and implemented before the next budgetary cycle</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To increase cost/budget accuracy, the organization should implement a new budgeting system that helps managers stay within budget after implementing the new system for budgeting. This system will be tested and implemented before the next budgetary cycle.
three departments within those organizations (marketing, HR, and finance). The purpose of this table is to show how outcomes, goals, and objectives help define the scope of a strategic plan.

You will see in table 1.1 that, in some cases, the link between the organization and the department responsible for executing the goals and objectives is very clear. In most instances, however, it will take several departments to accomplish the organizational goal. For example, in the financial services organization, the marketing department has responsibility for creating the marketing program; and in the health-care organization, the HR department will be responsible for developing new nurses’ safety training. In this same table you also will note that the technology organization seeks a new budgetary system. This appears to be a finance department objective, but individual managers will have to be responsible and be held accountable for making sure the cost to budget is managed and decreased. Most likely, that will involve the information systems department developing specifications and determining both whether the company’s existing equipment can support the new system and what systems will need to be linked to it (perhaps accounts payable and receivable).

The table illustrates the importance of linking department and group planning to the strategic plan and, ultimately, to individual performance plans. It’s important to note that the objectives are measurable not only by percentage of change but also by a timetable commitment. Table 1.2 summarizes important criteria for setting strategic plan outcomes, goals, and objectives.

No more than 10 outcomes should be identified for a strategic plan. If you identify more than 10, take some time to compare them to your priorities. The outcomes should help you determine the roles and those accountable for defining the goals and objectives for the strategic plan’s scope. To help you prioritize and decrease the number of outcomes you have identified, ask yourself the following four sets of questions:

1. How broad is the impact of this outcome? Will it affect the entire organization? What is the overall business im-
### TABLE 1.2
Criteria for Plan Outcomes, Goals, and Objectives

<table>
<thead>
<tr>
<th>Outcome Criteria</th>
<th>Goal Criteria</th>
<th>Objective Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>States what needs to be planned</td>
<td>Directly supports a stated strategic outcome</td>
<td>Is directly supportive of an outcome and goal</td>
</tr>
<tr>
<td>Projects the future of the organization</td>
<td>Is clear and lacks ambiguity or misinterpretation</td>
<td>Is measurable (by time, statistically, financially, or by other means) and can be verified</td>
</tr>
<tr>
<td>Includes key terms from which goals can be built</td>
<td>Aligns with the organization's values and culture</td>
<td>Is clear</td>
</tr>
<tr>
<td>Can be related to at least one goal</td>
<td>States a general intention, and needs not be measurable</td>
<td>Is something others within the organization can champion because they can relate to it</td>
</tr>
<tr>
<td>Makes writing a realistic plan possible</td>
<td>Is conceptual</td>
<td>Is tangible and concrete</td>
</tr>
<tr>
<td>Aligns with the organization's prioritized issues and needs</td>
<td>Is related to at least one (but preferably more) measurable objective(s)</td>
<td>Is consistent with the rest of the strategic plan</td>
</tr>
<tr>
<td>Describes something that will improve or provide a better future</td>
<td>Aligns with the organization's prioritized issues and needs</td>
<td>Aligns with the organization's prioritized issues and needs</td>
</tr>
</tbody>
</table>

- Is consistent with the rest of the strategic plan's outcomes
  - Has the support of senior management
  - Is realistic in its strategic intentions
  - Is feasible and can happen
  - Is supported by senior management
  - Is realistic in its strategic intentions
  - Is feasible and can happen

---

1. What impact? Will it improve the way we do business? Will it decrease quality problems or delays?

2. If we don't do this now, what will happen? Can this wait a couple of years? Will we lose market share, customers,
or employees? How big is the impact of not dealing with this now?

3. What is the financial impact of not addressing or fulfilling these outcomes, goals, and objectives now? Will it cost less to do it now than later? Is this an opportunity that will bring us a great deal of money? Is there a risk to the budget if this is not completed—a risk such as regulatory compliance, penalty, or fine?

4. Will it enrich or make employees' lives better and help the organization retain the “right” employees?

The sooner you identify the roles and accountabilities in the planning process, the better. If individuals and groups are involved early in the planning and have some say in preparation, they tend to be more committed. Creating and using a worksheet like the one illustrated in example 1.1 is helpful in assigning accountability for strategic planning.

In this example, B. Homez, senior manager of finance, is responsible for all of the outcomes. Because she is accountable for the results desired from the strategic plan, it is her responsibility to coordinate the other people responsible; to help them create outcomes, goals, and objectives; and to monitor their success to ensure the strategic outcome is met.

Determining the Timeframe

An important part of defining the scope for the strategic plan is determining the timeframe for developing the plan. This is a difficult task that depends on many factors, including

- size of the organization: Typically, the larger the organization, the more time it will take to create a strategic plan.

- complexity of the organization: If there are many departments, divisions, diverse product lines, varied customer groups, and lots of locations, the strategic plan will be more complex and will take longer to develop.

- success rate of strategic planning: If there is a successful strategic plan in place, it will take less time to create a re-
vision. But if this is the first time a strategic plan is to be developed, it will take more time. Worse yet, if a plan has been created but never used, then it will take longer to gain commitment to plan development.

- availability and accessibility of information (such as employee satisfaction surveys, customer data, and financial data) needed for the planning effort: The rule is that the
more data readily available, the shorter the timeframe for planning.

- previous strategic planning experience in the organization: It should take less time if those involved have experience in developing a successful strategic plan.

- state of the business: Is it stable or is it in turmoil? The more stable the business, the less time strategic planning will take.

- resource availability: For the plan to be written quickly, strategic planning needs to be a priority for those involved.

- approval and signoff required: The more channels involved in approving the strategic plan, the more time is needed. Completing the plan will take longer in a highly regulated or complex environment.

Generally speaking, small companies can produce a plan in less than three months, and most companies can launch a plan in six to 12 months. If a plan is already in place and just needs some maintenance, it can take fewer than 60 days to complete.

### Identifying Key Participants

Key participants who will be involved as you develop the strategic plan include customers, stakeholders, and business partners. Another term used to identify these groups is advocates. These are the people who have a stake in the strategic plan and who will support its development and execution.

The term customers may refer to different parties for different objectives. For some objectives, the customer who uses the products and services is external to the organization; for others, he or she is within the organization.

Stakeholders are the people who have the most to gain from the business outcomes of the products and services offered by the organization. It is critical to identify stakeholders in the beginning of the strategic planning process because their support of the mission,
objectives, and plan will lend political strength. Committed stakeholders can help overcome barriers to gathering information, obtaining resources, and ensuring the success of the final plan.

Business partners are those within or outside of the organization with whom you work to deliver your products and services, or those who have a similar stake in what you provide (for example, Intel partners with hardware providers, such as HP, IBM, and Dell, who use the computer chips Intel produces). They are Intel customers and business partners because there is an end-use customer who actually buys the computers. Another example of a business partner relationship is a restaurant that partners with a soft drink company like Pepsi or Coke. Although the restaurant is a customer of the soft drink company, they are business partners because they share the same end-use customer, the diner. Multiple internal business partner relationships exist within organizations. Your department may be HR but you are business partners with marketing, information systems, and finance, and all of you must work together to achieve successful outcomes.

Mapping Advocacy

A fourth key participant is a sponsor. If you are completing an internal strategy that fits under an organizationwide strategy, then most likely you will have a sponsor. This is the executive or senior manager who provides the financial approval for your group to spend time and resources developing a plan. The sponsor may be the department manager or someone else, depending on your orga-
nization’s structure. The sponsor not only champions the development of the department strategic plan but also is responsible for ensuring that the completed plan is executed.

At this point, you should begin to have a feeling for how much information you have on hand and how much you will need to collect. You also should begin to know who would be a good member of the strategic planning work group. If you are a department or group that is developing a plan that is to guide your future work, then you need to ask yourself the following questions before proceeding:

- Is your department or group correctly aligned within the organization? Does the group report to a senior manager or to someone who reports to a senior manager who is directly involved in planning and implementing key initiatives within the organization? Does this senior manager understand the role the group plays in supporting and increasing the value of the organization?

- Does your group have the ability to identify the correct stakeholders for key initiatives and their customers, business partners, and sponsors? Does your group have access to those who hold key information so that you can gather the best information for key business decisions and plans?

- What do your advocates know about you?

- How do you interact with your advocates—is it in meetings, on a one-to-one basis, or via technology?

- What are the communication touch points? When do you communicate with your advocates?

- What is the structure of the organization (matrix, hierarchical, or some other form)? How does this structure affect advocacy?

- How are your customers’ organizations structured and how does this affect your advocacy for the products and services that will best support them?

If your group is comfortable with the information it has about its advocates, you’re ready to map your advocacy. Such mapping involves identifying your advocates and the benefits that accrue...
when there is a well-defined strategy. As you map advocacy for your plan, you clarify “what’s in it for them” and how the strategy will support them. Mapping advocacy will help you:

- identify, clarify, and validate for your advocates the benefits that will derive from developing a strategic plan
- determine if there is resistance to developing a strategic plan, and if so, how to overcome it
- evaluate your presence as a strategic leader
- begin building an understanding of what it will take to gain commitment and support for the strategic plan to be executed.

Worksheet 1.1 can help you identify the benefits and strategic objectives for each advocate to be supported by the strategic plan. Examples of the four advocate types are provided to demonstrate how perspectives differ among advocates and how speaking to each perspective can be useful in gaining advocacy. If this worksheet is used in a group setting, be sure to address the additional facilitation questions provided in part B. The example given on the worksheet is of a planning and development group that delivers product training to internal customers.
**WORKSHEET 1.1**

*Mapping Advocacy*

**Part A: Identifying Strategic Plan Advocates**

<table>
<thead>
<tr>
<th>Advocate Role</th>
<th>Defining Questions</th>
<th>Your Identified Advocate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>• Who is the group or individual who pays for your programs?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Are there multiple funding methods? If so, who funds you, and how?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Who participates in your programs?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Do you have participants who are internal and external to your organization?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Do you have different levels of participants (for example, very technical,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>varied information needs, skill needs, knowledge-only needs)?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Are there different levels of owners within your customer group (for example,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>business owner, team lead or supervisor, participant)? If so, what are the</td>
<td></td>
</tr>
<tr>
<td></td>
<td>levels, and who represents each level?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Who is the end-use customer? Are there different types of end-use customers (such</td>
<td></td>
</tr>
<tr>
<td></td>
<td>as product-only buyers, product and service buyers)?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Who relies on the implementation of skills or knowledge contained in your products</td>
<td></td>
</tr>
<tr>
<td></td>
<td>and services to produce successful outcomes or end results back on the job?</td>
<td></td>
</tr>
<tr>
<td>Stakeholder</td>
<td>• Who within your organization funds your products and services?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• As a result of your products and services, who within your organization receives</td>
<td></td>
</tr>
<tr>
<td></td>
<td>revenue?</td>
<td></td>
</tr>
</tbody>
</table>
### Part A: Understanding Your Organization

**Business Partner**
- Who within your organization needs you to provide your products and services because they do not have the ability or time to do so?
- Who within your organization needs to partner with you because you provide their customers with the supporting products and services they need to be effective?
- Who do you need within your organization so that you can be effective? For example, who holds the information that you need to design your products and services?
- Who within your organization has information that you need about the customer?
- With whom inside your organization do you need to work so you can be effective?

**Sponsor**
- Who champions what you do within your organization?
- Who funds you within your organization?
- Who is committed to your existence within your organization?

### Part B: Facilitation Questions

1. How does knowing your customers, stakeholders, business partners, and sponsors inform your strategic plan?
2. How will you use this information to move forward in building your strategic plan?
3. How will you validate this information?
4. Based on this discussion, what do you see differently regarding your customers, stakeholders, business partners, and sponsors, and how is this important to your planning process?
Gaining Commitment

Whether you are developing a strategic plan for the entire organization or one that is to guide a department or group, you will need to gain commitment to spend the time and resources needed to conduct the requisite research and develop the plan. If commitment is lacking, it usually means one of these three things:

1. The organization, department, or group isn’t ready to start the process.
2. The benefits of strategic planning need to be better understood by the advocates.
3. Strategic planning was done in the past, was not done well, and did not guide or inspire the organization or group.

Regardless of the degree of commitment to develop a strategic plan within the organization, group, or department, you certainly will have to sell the plan to some or all of the players. It’s helpful to start early by speaking with various participants who will bring or have input into the planning process, who know how to identify priorities, and who make the “big decisions.” In strategic planning, as in many other things, people will react more positively if they understand what commitment they are being asked to make and what outcomes they may expect from that commitment. Tables 1.3 and 1.4 present tactics for overcoming resistance to strategic planning and the benefits of and selling points for developing a strategic plan.

At this point in Step 1 of the strategic planning process, you will either have the commitment needed to initiate plan development or you will need to meet with more advocates to strengthen their commitment. If you have strong relationships with your customers, stakeholders, business partners, and sponsors, you may need to do no more than let them know your intentions to develop and execute the plan. You also may find that you need additional resources from a particular party. If that’s the case, worksheet 1.2 can help you identify additional advocates and the resources you lack. In column 1 of the worksheet, identify the role of any advocates from whom you
### TABLE 1.3

**Tactics for Overcoming Resistance to Strategic Planning**

<table>
<thead>
<tr>
<th>Type of Resistance</th>
<th>Tactic</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time:</strong> Developing a strategy takes a long time, with lots of meetings, and the advocate wants immediate action.</td>
<td>* Clarify how much time you think the process will take; then discuss the time requirements with your advocate.</td>
</tr>
<tr>
<td></td>
<td>* Describe the negative consequences of not doing the strategy, including lost opportunities to save time and other costs.</td>
</tr>
<tr>
<td></td>
<td>* Ask the advocate to help you identify ways to get to information or resources that will save time.</td>
</tr>
<tr>
<td><strong>Too much data gathering:</strong> The advocate is concerned that your group is going after information that already exists.</td>
<td>* Ask for the advocate’s assistance in identifying what information exists and where or how it can be obtained. Then map what information exists and what does not, and identify how best to collect the information that does not already exist.</td>
</tr>
<tr>
<td></td>
<td>* Keep information gathering to a minimum, and gather only what is critical (this will be discussed further in Step 3). Demonstrate the leanness of your information gathering in a plan to collect data.</td>
</tr>
<tr>
<td></td>
<td>* If possible, collect data from a central source, which is more efficient than collecting them from several sources.</td>
</tr>
<tr>
<td><strong>Decision-making displacement (also known as politics):</strong> The advocate feels that, by developing and executing a group or department strategic plan, you will be making decisions that your business partners or stakeholders have authority to make.</td>
<td>* Be clear about what you want to know and why.</td>
</tr>
<tr>
<td></td>
<td>* Demonstrate that you want to work with the advocate—not against him or her.</td>
</tr>
<tr>
<td></td>
<td>* Demonstrate that you want the advocate’s input, and stress the benefits of the plan for him or her.</td>
</tr>
<tr>
<td></td>
<td>* Discuss the outcomes and results that will benefit the advocate if you develop and execute a strategic plan (for example, it will make her or him look good).</td>
</tr>
</tbody>
</table>

*continued on next page*
Table 1.3, continued

<table>
<thead>
<tr>
<th>Type of Resistance</th>
<th>Tactic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource constraints: The advocate feels that there are only so many financial,</td>
<td>• Discuss how a strategy will ensure that you manage resources more effectively.</td>
</tr>
<tr>
<td>human, and other resources, and that building a strategic plan might lessen her</td>
<td>• Discuss the benefits of developing and executing a strategic plan.</td>
</tr>
<tr>
<td>or his share.</td>
<td>• Describe the negative resource consequences of not having the strategy.</td>
</tr>
<tr>
<td></td>
<td>• Ask the advocate to help you identify ways to use resources more efficiently or effectively as part of your strategy definition.</td>
</tr>
<tr>
<td>Hidden agenda: You cannot ascertain the source of the resistance.</td>
<td>• Adopt a questioning mode. For example, ask, “How do you think we can be of better service? What is your vision of what we do? How can we serve your needs?”</td>
</tr>
<tr>
<td></td>
<td>• Demonstrate that you want to work with, not against, the advocate.</td>
</tr>
<tr>
<td></td>
<td>• If you don’t gain the advocate’s commitment in the first meeting, ask to meet for another discussion after you both have had time to think it through. Then review what was revealed during the intervening questioning period.</td>
</tr>
<tr>
<td>The advocate wants something other than a strategy: You’re told, “Strategic</td>
<td>• Ask the advocate to describe what she or he thinks strategic planning is, and to reveal his or her vision of what you should do.</td>
</tr>
<tr>
<td>planning is a waste; you should do….”</td>
<td>• Discuss how both the strategic planning approach and the advocate’s approach affect the business.</td>
</tr>
<tr>
<td></td>
<td>• Discuss the process and goals of both approaches.</td>
</tr>
<tr>
<td></td>
<td>• Discuss how both approaches address the people involved and the performance desired.</td>
</tr>
<tr>
<td></td>
<td>• Discuss how both approaches address obstacles and barriers to achieving desired goals.</td>
</tr>
<tr>
<td></td>
<td>• Determine if both of you are trying to get to the same place, but calling it different things.</td>
</tr>
<tr>
<td></td>
<td>• Negotiate a common ground.</td>
</tr>
</tbody>
</table>
### Strategic Planning Benefits and Selling Points

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Selling Points</th>
</tr>
</thead>
</table>
| Strategic planning provides a structure or foundation for taking action. | * It sets goals that can be communicated and shared.  
* It creates a shared vision for all parties.  
* It provides a set of criteria and understandings for future decision making.  
* It establishes a timeframe for specific actions.  
* It identifies expected results or outcomes, and links those to business initiatives that will materialize as a result of action taken. |
| Strategic planning enables leadership to move forward. | * It creates energy for action.  
* It gives permission to move forward and make changes or initiate endeavors. |
| Strategic planning involves organizing data so that action can be taken. | * It provides information for informed decision making.  
* It provides a better understanding of the organization’s environment.  
* It identifies current and potential trends.  
* It details the capabilities and limitations present in the organization.  
* It helps the organization, department, or group consider how it needs to respond to the future. |
| Strategic planning enables the organization, department, or group to manage its future. | * It provides an opportunity to review competitors’ and others’ actions and decide how the organization or unit will respond.  
* It helps identify what skills and knowledge the entity will need to be competitive.  
* It helps the organization, department, or group be proactive rather than reactive. |
| Strategic planning establishes a position. | * It illustrates where the organization, department, or group stands currently in the perspective of customers, competition, and others.  
* It creates a story of where the organization, department, or group is and where it has been.  
* It documents historical trends from organizational, departmental, or group history that can be used to address the future.  
* It identifies how the entity communicates, adapts to change, competes, and leverages its resources. |

*continued on next page*
Table 1.4, continued

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Selling Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic planning creates a set of guidelines or rules for action.</td>
<td>+ It identifies processes and procedures that are critical to the way the organization, department, or group does business.</td>
</tr>
<tr>
<td></td>
<td>+ It defines boundaries in allocating resources for opportunities that will provide results.</td>
</tr>
<tr>
<td></td>
<td>+ It identifies priorities for allocating resources and initiating action.</td>
</tr>
<tr>
<td></td>
<td>+ It identifies when the organization, department, or group should discontinue or update its programs or services.</td>
</tr>
<tr>
<td>Strategic planning makes the entity competitive.</td>
<td>+ It makes the organization or unit more efficient and effective by promoting up-front planning.</td>
</tr>
<tr>
<td></td>
<td>+ It ensures that the entity has allocated and prioritized its resources effectively.</td>
</tr>
<tr>
<td></td>
<td>+ It provides criteria for evaluating actions, and ensures that the organization, department, or group is making wise decisions.</td>
</tr>
<tr>
<td></td>
<td>+ It orients the organization or unit thinking toward action rather than keeping it stuck in the past.</td>
</tr>
<tr>
<td>Strategic planning defines an organization’s, department’s, or group’s value chain.</td>
<td>+ It articulates key leverage points (areas where a small amount of resources yields a higher return).</td>
</tr>
<tr>
<td></td>
<td>+ It identifies the activities that add value to an entity’s services and products, and the sequence in which those activities occur.</td>
</tr>
<tr>
<td></td>
<td>+ It describes why and how what the organization or unit does adds value.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

still need commitment, and in column 2, list what you need them to provide. When you’ve identified whom and what you need, use part B to prompt a discussion of the how—how to gain commitment if the advocate and resource are not already on board. The worksheet provides a few examples to demonstrate its use.

Marketing Your Strategic Plan

After completing worksheet 1.2, you may have found you need to gather a great deal more information from your customers, stakeholders, business partners, and sponsors. If so, you must begin mar-
### WORKSHEET 1.2

**Identifying Additional Advocates and Resources**

**Part A: Gaining Commitment from Additional Advocates**

<table>
<thead>
<tr>
<th>Role of Advocate</th>
<th>What Advocate Must Commit to Provide</th>
<th>Is Advocate Committed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research and development</td>
<td>New product information for the next 12 months, including targeted customer demographics, product specifications, and product testing information</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Customer call center</td>
<td>Data about customer requests and complaints, common customer questions</td>
<td>Yes ☐ No ☐</td>
</tr>
<tr>
<td>Sponsor (human resources manager)</td>
<td>Financial and time resources to engage in planning effort</td>
<td>Yes ☐ No ☐</td>
</tr>
</tbody>
</table>

*continued on next page*
Worksheet 1.2, continued

Part B: Facilitation Questions

1. Do we expect resistance from the advocates from whom we do not yet have commitment? If so, what type of resistance?

2. How will we overcome any resistance to developing and executing a strategic plan or to providing the information, resources, and so forth that we need to develop a plan?

3. Of the information needs listed above for which we do not have commitment, which is the most critical to the strategic plan?

4. Who will get the information—someone responsible for the strategic plan or the person in the resource role?

5. Who most likely would be successful in gaining the commitment, and why?

6. If we do not get the commitment needed, what is our back-up plan?

Marketing the idea of your plan to gain commitment from advocates and to collect the information needed to go forward. Even if you have all of the information you need, it’s beneficial to hold group discussions about how to promote your efforts to build a strategic plan in routinely scheduled meetings, project meetings, or status reports. Informing others about what you’re doing will encourage support and commitment, assuage concerns, and remove roadblocks.

You can use worksheet 1.3 to facilitate a group discussion to identify what you will communicate about your beginning work on the strategic plan. After you complete this worksheet, you will have an outline of what to communicate about the intent of the strategic plan and how you will develop it. You can build your presentation from this outline. Communication questions that your group should address are provided in the first column. In the second column, jot down your notes about the group’s responses.

Tool 1.1 lists questions you can use to identify the tasks necessary for initiating the marketing for a strategic plan. This tool also can be used in a group discussion to identify who will be responsible for initiating these tasks and how they will do so.
### WORKSHEET 1.3

#### Communicating Your Strategy

<table>
<thead>
<tr>
<th>Communication Question</th>
<th>Your Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is the purpose of the strategic plan?</td>
<td></td>
</tr>
<tr>
<td>2. How do you intend to use the information you collected for the strategic plan?</td>
<td></td>
</tr>
<tr>
<td>3. Why is there a need for the strategic plan in your organization's current environment?</td>
<td></td>
</tr>
<tr>
<td>4. How will you communicate the status and results of the strategic plan on an ongoing basis?</td>
<td></td>
</tr>
<tr>
<td>5. If someone needs more information about the strategic planning efforts, who within your group should he or she contact?</td>
<td></td>
</tr>
<tr>
<td>6. Overall, how long do you expect the strategic plan development process to take, and what resources will you need?</td>
<td></td>
</tr>
</tbody>
</table>
ToOl 1.1

Initiating and Evaluating Strategic Plan Marketing

Part A: The first part of this tool will help initiate the marketing for a strategic plan. It should be used in a group discussion that focuses on how to market the plan. Column 1 lists questions to help you identify the basic tasks you need to undertake in marketing the strategic plan to customers, business partners, management, employees, and possibly the public and/or press. Column 2 is provided for your notes about that task—your thoughts about why the task is important to your organization, the best methods for achieving it, the mechanisms already in place from which the task could be made less time consuming (for example, Websites or employee email blasts), and so on. In column 3, list the follow-up actions resulting from the discussion and identify a person who will lead each task. It’s important that one person be identified who will be accountable for completing the task.

<table>
<thead>
<tr>
<th>Questions for Brainstorming Marketing Tasks</th>
<th>Discussion Notes</th>
<th>Follow-up Action and Assigned Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What is the status of the organization’s strategic planning effort (past, present, future)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. What are the reasons the organization is focusing on strategic planning now?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. What will be the key themes of the strategic plan?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. What is the message about the strategic plan you want presented to others?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Are there different messages (one to customers, another to employees, to</td>
<td></td>
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</tbody>
</table>
6. What media are important to use to provide the message(s)?

7. Is mixed media needed for one group or multiple groups (for example, an employee newsletter or email blast)?

8. What is important about this initial planning for the strategic plan that you need to communicate to others?

9. When should the strategic outcomes, goals, and objectives be communicated?

10. To whom should the strategic outcomes, goals, and objectives be communicated?

11. Who are our target audiences (now and in the future), and what behavioral changes do we want to see as a result of the strategic plan messages (for example, employees volunteer to be involved in the planning process)?

12. Where have we been successful in conveying similar messages, and

continued on next page
### Tool 1.1, continued

<table>
<thead>
<tr>
<th>Questions for Brainstorming Marketing Tasks</th>
<th>Discussion Notes</th>
<th>Follow-up Action and Assigned Person</th>
</tr>
</thead>
<tbody>
<tr>
<td>why were we successful? Is that process transferable to this effort?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. How have other organizations like us successfully marketed their strategic plans? What could we learn from their experiences?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. How should the strategic outcomes, goals, and objectives be communicated?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. What resistance messages should be countered in the communication?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. How should the resistance messages be countered?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. What opportunities will the strategic plan provide that we as an organization aren't focusing on as we should?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. What communication vehicles are present today that should be used for communicating the strategic plan marketing, and to whom do they provide information?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Who will need to review messages (legal department, strategic planning</td>
<td></td>
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</tbody>
</table>
leader, executive leadership, and so forth)?

20. What distribution strategy should be in place for this communication and for following communications about the strategy and its development?

21. Do we need some sort of promotional strategy (for example, free pizza at quarterly meetings held to talk about the strategy, free pencils with the mission)?

22. What is or will be our budget?

23. Who will be the contact if individuals want more information about the strategic plan?

24. Who will be the primary lead for the marketing of the strategic plan?

25. Who will take ownership/accountability for ensuring that the follow-up actions are completed by the people assigned and that the plan is implemented in a timely manner?

continued on next page
Part B: Here is a list of questions to help you evaluate the effectiveness of the marketing tasks and their results. The questions are listed in column 1 and space is provided in column 2 for your discussion notes.

<table>
<thead>
<tr>
<th>Questions for Evaluating the Strategic Plan Marketing</th>
<th>Discussion Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are/were the leadership roles and accountabilities defined, and did the people assigned follow through? How do you know?</td>
<td></td>
</tr>
<tr>
<td>2. The purpose of the marketing is not to convey a message, but to change behaviors and thoughts. Was this successful? How? What is the evidence?</td>
<td></td>
</tr>
<tr>
<td>3. Did those involved in reviewing the strategic planning efforts provide timely feedback and assistance?</td>
<td></td>
</tr>
<tr>
<td>4. Did a two-way communication occur between the strategic planners and others as a result of the marketing effort?</td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>5. Was interest in the strategic plan evident in the audiences?</td>
<td></td>
</tr>
<tr>
<td>How? Was this positive for the development of the plan?</td>
<td></td>
</tr>
<tr>
<td>6. Did the promotion tactics work? Why or why not, and how?</td>
<td></td>
</tr>
<tr>
<td>7. Did the media used meet the audiences’ needs? How do you know?</td>
<td></td>
</tr>
<tr>
<td>8. Was communication about the strategic planning efforts consistent and regular?</td>
<td></td>
</tr>
<tr>
<td>9. Were the messages influential?</td>
<td></td>
</tr>
<tr>
<td>10. Were the messages credible?</td>
<td></td>
</tr>
<tr>
<td>11. Were the communication methods creative, and did they capture the audiences’ attention? How do you know?</td>
<td></td>
</tr>
</tbody>
</table>
Now it’s time to turn your attention to Step 2 of strategic planning. In that step you’ll begin to involve others in developing the plan. The next step focuses on conducting a kickoff meeting and identifying the data that need to be collected to validate the outcomes, goals, and objectives drafted in Step 1.
Susan Barksdale and Teri Lund have worked together for more than 15 years providing businesses with consulting services and expertise in strategic planning, evaluation, and performance improvement. They are known for their practical approaches to improving business processes, performance, and the bottom line, and have been praised for their ability to translate complex theory into easy-to-understand applications. They have worked to improve performance and strategy for many organizations, including HP, Intel, Microsoft, Allstate Insurance, Wells Fargo, US Bank, The Capital Group Companies, TVA, ETHOS Development, Sun Microsystems, and Intelsoft Technologies.

Susan Barksdale has been a consultant for many large corporations for the past 23 years. Prior to this, she managed training and consulting departments for two financial consulting firms. She holds both undergraduate and graduate degrees from the University of Wisconsin (UW). Before entering the performance improvement field in 1979, she was a psychotherapist at a major medical center and in private practice. Barksdale also taught communication and behavior management courses at UW–Milwaukee.

Teri Lund has been an external consultant for the past 15 years, after holding management positions for Barclays Bank, Kaiser Permanent, and Sealund and Associates. She has a bachelor of science degree in education from Montana State University and a master’s degree in international business and finance from New York University. Lund has in-depth experience in managing projects, implementing technology solutions, and determining and measuring return-on-investment.

Barksdale and Lund repeatedly have been invited to present their work before international audiences at professional performance improvement conferences, and their writing has been published in several periodicals.