



Developing Strategic Business Planning Skills

An Online Continuing Education Course for Engineers

Course Number: FM-7002

Credit: 7 Hours / 7 PDH / 7 CPD

A Note from the Author:

Welcome to one of our two courses for developing strategic business planning skills. We offer two courses because there is so much material, not because you must take the first before you move on to the more advanced second. These are presented in a manner that you can easily apply in any organization of any size whether public, private, or non-profit.

As a course, it will take you into, over, and through a lot of what may be new information if you are an engineering or project management professional who has not had a lot of contact with the business side of your profession. This is a wide range of topics arranged together into a journey designed to help you see the organizational world around you from a high perspective - a seat at the lofty "Table" that everyone talks about.

We will help you understand how a "Strategic Planner" must look at events, situations, and participants around them so they can create, present, and follow a map that can take the organization from today into tomorrow. And not just follow the map alone like an explorer in the wilderness. Instead, they must take the rest of the organization on the journey, too. Sometimes, taking them there involves acting as an internal consultant to other leaders and helping them prepare their employees for the journey to come.

I invite you to begin your journey from this hypothetical situation. I think it will help you understand the presentation of this material. It will help it flow more easily and be more engaging and useful for you. Here we go:

Assume you are a very competent engineering or project management professional who has developed an excellent record in your technical field working for a mid-sized, family-owned company. Your boss is a nephew of the company owner and owes his position to kinship, not necessarily competence. You have been there for 10 years, doing an excellent job dealing with the daily tasks associated with your profession.

The company has been described as "solid, steady, but in no danger of setting the world on fire in its market." Just 10 days ago, the founder of the company, who has been President and CEO for the past forty years, finally succumbed to a lingering illness and passed away. His daughter, his only child and heir, was promoted from VP of Business Development to the top spot.

She went to a prestigious business school and has really brought the BD Department to life in the past eighteen months, and it is clear she is a "hard charger with fire in her belly," to quote an observer.

Apparently, she knows who actually gets things done in the operations area and calls you to her office late one afternoon. She thanks you for your years of dedication and hard work and asks if you are willing to create and fill a position in a different side of the company business - STRATEGIC PLANNER.

Although you really didn't know much about the concept, she briefly explained that you would be her in-house "Strategic Planner" regarding organizational development issues associated with "shaking this company out of its rut and dragging it kicking and screaming into the 21st Century."

You accepted the assignment, new designation, and pay increase. So today, Friday, you leave the office as an engineer or project management professional, and Monday morning, you will come back in as the designated Strategic Planner. Suddenly, you have this frightening thought as it all begins to sink in...WHAT THE HECK DOES A STRATEGIC PLANNER DO?

We hope this course/manual is a valuable, educational, and practical experience for you. We wish you the best of luck on your journey. Please get in touch with me through the website if I can help you solve some strategic thinking problems or if you want a sounding board to bounce some ideas off of.

Good luck...

Dick Grimes

Course Overview

"Engineer/PMP to Strategic Planner" - WHAT'S THE DIFFERENCE? Is this just some way to rename the same old job to make it sound more important?

No, it is something very much different. Strategic business management planning encompasses issues that fall OUTSIDE of the traditional engineering or project management function and directly relate to the business of the organization, such as:

- Business-related topics such as finance, marketing, employee relations, and information technology
- Topics related to the general business environment:
 - Industry practices and developments, technological developments, economic environment, and labor pool/demographic trends
 - Organizational strategic planning, organizational budgeting, corporate social responsibility, corporate governance/ethics, and due diligence for mergers and acquisitions
- Aligning human capital activities with the business plan, such as:
 - Developing metrics to measure Human Resource's contributions
 - Integrating technology into Human Resource applications
 - Leadership development systems tied to organizational goals

The short explanation is ***a strategic planner plan for tomorrow while everyone else is dealing with today.***

This course includes many Human Resource issues because of one very important fact that many strategic planning initiatives overlook: ***acquisition, maintenance, and development of a productive workforce is the greatest expense of any business.*** Suppose you want to become an effective strategic planner for your organization. In that case, you must have a thorough understanding of the vital role played by your Human Resources group.

This do-it-yourself (DIY) manual will help a self-directed professional who wants to evolve from the day-to-day issues to eventually becoming a contributing participant at "The Table" helping the executive team's plan for the future become a reality.

Your journey to the Table using this manual will follow this path:

- Looking inward and helping you prepare for the long journey ahead (you did not think this would be accomplished in an afternoon, did you?)
- Looking outward at the organization and viewing its long-range plans through the lens of the short-range reality you will be facing from your current perspective

We introduce you to some critical topics that you will encounter along the way. We will lead you far enough into them so you will be able to understand and discuss their basic concepts with the wide range of professionals, consultants, and vendors you will encounter in your new role.

Topics such as:

- Analyzing Your Impression on Others
- Creating a Self-Development Plan
- Useful Metrics
 - HR metrics
 - Performance measurements & feedback
 - Statistical forecasting - break-even analysis
- Performance Management Issues
- Establishing Performance Goals with Others
- Designing “Hard” and “Soft” Performance Scales
- Understanding Work Performance Feedback Loops
- Designing a Performance Measurement Process
- Performance Problem Analysis
- Workforce Development Fundamentals
- Productivity Issues
- Understanding Power & Influence

There may be pieces of these topics with which you are already familiar, or we may touch on issues that you think you'll never encounter where you currently work. Please have patience and study anyway because in this world of mergers, acquisitions, downsizing, rightsizing, or outright bankruptcy...*you may not always work there and may need to know it in some unanticipated venue.*

Also, we are mixing strategic concepts like aligning performance with long-term goals with general pointers on actually developing the performance metrics you can use.

In your role as a Strategic Planner, you will become a teacher, coach, counselor, temporary project manager, role model, and sometimes feel like you're the only person who grasps the enormity of facilitating the organizational changes necessary to achieve the executive's announced goals.

Don't let that bother you. We have provided many samples of forms, dialogues, discussion hints, and explanations of topics that you can use as you work with the key players you must rally to your mission of change. They have proven effective in the past and will work for you if you let them. Please feel free to print this course, take it with you, mark it up as needed, and let it be a reference as you chart your journey forward.

Learning Outcomes

As a participant in this course, you will be able to:

1. Identify Seven Personal Elements of Success.
2. Analyze your current role to determine important elements for your success as a strategic planner.
3. Explain the activities and organizational perspective of a strategic planner.
4. Develop a plan for building alliances with others.
5. Examine your behaviors to determine if there are “qualifiers” associated with them that may restrict your career development.
6. Analyze your daily performances to determine if they are actually productive or just “busy.”
7. Explain the difference between work stress and work tension within a workforce.
8. Explain and determine whether you connect authentically with others.
9. Analyze yourself to determine the extent of your orientation toward reality.
10. Analyze your ability to embrace, engage, and deal with the negative.
11. Analyze your daily behavior to discover your potential for self-inflicting wounds.
12. Analyze the potential impression that you make on others.
13. Understand and apply the basic elements of getting people to like working with you.
14. Prioritize those elements of your behavior to ensure the most successful interaction.
15. Explain the value of managing your reaction to an event when you cannot control the event itself.
16. Explain the value of maintaining a sense of proportion when encountering disappointment so as not to harm your strategic plans.
17. A proven method of helping people adapt to organizational change.
18. Apply the Cheshire Cat’s lesson to organizational strategic planning.
19. Describe and apply the value of “losing smartly.”
20. Express desired goals with the critical trio of performance elements.
21. Explain the value of and design “feedback loops” for workflows.
22. Analyze typical project work processes for opportunities for process improvement.
23. Identify the value of developing a mentoring relationship.
24. Describe the various types and sources of power within an organization.
25. Express planning expectations in terms guaranteed to result in productive outcomes.

26. Design a “hard” & “soft” skills performance scale to measure employee performance within the parameters of your strategic plan.
27. Design an overall employee performance assessment instrument to gauge progress within your strategic plan.
28. Design an overall performance measurement process for organizational implementation.
29. Develop a strategic action plan for individuals.
30. Design and conduct effective goal-setting meetings.

Introspection

If you plan to s
and throughout
journey upward

If you do not pos
always come back
introspection and
later. You can be a
that you never expe

Seven Personal

Look around you and
define “successful” as
minimal negative impac
have or the extent of t

Think about some of Am
largest companies during the late 1990s, such as Enron, HealthSouth,
Arthur Anderson, Tyco, and WorldCom¹. Their leaders earned millions of dollars annually, and they held enormous power within their organizations and the business community around them. Now, years later, what do they all have in common? Their leaders have been charged with various kinds of criminal activity, been publicly disgraced, and some are even serving jail sentences.ⁱ

Were they successful? Sure, and they also successfully ran their companies to the brink of extinction, destroyed the retirement hopes of thousands of employees, wiped out billions of dollars of investments for stockholders, and ruined the lives of many innocent people associated with them or

their companies. In all cases, these people of extraordinary talents also possessed fatal flaws that brought them down.

¹ http://money.cnn.com/2002/07/19/news/worldcom_bankruptcy/