

7 tips for executing a strategic plan successfully

Lessons learned from successful campus implementation efforts.

BY PATRICK SANAGHAN | OCT 25 2021

Over the past 30 years I have helped facilitate 120 strategic plans on campuses in the United States and Canada. Most plans are well written and aspirational. But when it comes to implementing them, unfortunately many campuses are less than successful. Over the past two years I have done a “deep dive” with six campuses to discover what works and doesn’t regarding implementation.

In the post-COVID-19 world, we will have to become world class at implementing the right things. But this will not be easy, given higher education’s tendency to do more, not less. The following are some lessons learned from successful campus implementation efforts:

1. The strategic plan should have a leader’s name identified for each goal and key objective. The finance division is not a person, nor is the faculty or administrative councils. Naming specific individuals communicates to campus stakeholders that accountability is an institutional value. Unfortunately, this best practice is as rare as blue diamonds.

2. Meaningful faculty engagement in crafting the strategic plan is essential to success. If faculty don’t see their “fingerprints” on the plan, it won’t get implemented. I recently observed a planning debrief on a campus that was using Zoom. The provost led the meeting and 180 people, mostly faculty, participated thanks to excellent facilitation and tech support. We will all have to get more comfortable using technology in a way that connects stakeholders and meaningfully involves faculty along the way.

3. In my experience, middle management (e.g. chairpersons, managers, directors) are key to implementation success because they do the heavy lifting. Other leaders are important, of course, but the “middle” is what really matters. They are closer to the action and front lines. They know what’s doable and, most importantly, they almost always have great influence and credibility with their people. If they believe in the plan, it will increase the odds of carrying it out.

4. Small wins matter. People need to see that they are making progress toward the stated goals of the strategic plan. Therefore, we need to make the goals “chewable” by making them smaller and achievable. Big, audacious goals were popular years ago, but are a powerful misdirection.

Long-term goals sap energy, motivation and morale because people can’t see the horizon or the finish line and don’t feel that they can ever win. If people see progress, they will be motivated to push forward and persist over time. Persistence, not great ideas, is at least half the game.

Having a visible scorecard for each business unit, department or school is very helpful. Keep this simple and clear, and avoid the planning office’s attraction to key performance indicators and Excel spreadsheets. Most people don’t like them. Lastly, when a campus experiences a success, celebrate it and spread the word. We need to be better at acknowledging what’s working on our campuses.

5. Trust is a strategic asset. This theme is a gamechanger and, for my money, the most important idea for institutional leaders to understand. Leaders need to be able to assess the level of trust on their campus and build ways to create and nurture trust throughout the planning and implementation process. Transparency and inclusion help to build trust. So does clarifying the decision rules.

6. Focus on conversations, not presentations. Senior leaders are often enamored by PowerPoint presentations and lots of colourful graphs. People usually get overwhelmed with too much information, when they need to talk about the “how” of implementation. It’s important for stakeholders to have small group discussions about the implications of what leaders want to achieve with the strategic plan.

These conversations are where people can ask honest questions without feeling that they are at risk if they raise a concern about the feasibility of the strategic plan. Unless these conversations happen, leaders will not get the authentic buy-in and engagement they so desperately need.

7. It’s important that people understand who decides what, and what level of input and influence people have, when it comes to implementation efforts. When the “decision rules” are fuzzy, implementation falters because people are unsure about what they are allowed to do and what level of freedom they have moving forward. The board, president’s cabinet and faculty senate all need to get on the same page about how they will make decisions and what their decision boundaries are regarding implementation, and communicate this to everyone on campus.

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