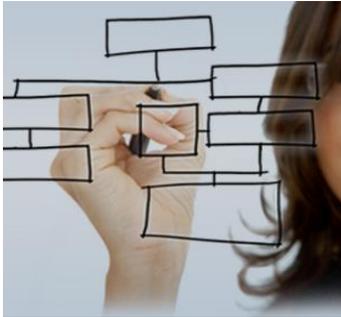


# How to hire strategic planning expertise from the outside, while driving the process from inside

By Carol A. Poore, Ph.D., MBA

So, you're embarking on your organization's strategic planning process, leading the charge, and feeling far, far behind.



You *know* you need to hire some outside help. But where do you start, and what type of expertise could add value to your firm's situation?

When well-structured, an effective strategic planning consultant can complement your company's executive team and staff. When properly managed, strategic planning consultants can provide niche expertise and objective third-party facilitation leading to an effective process and better outcomes. For example, consultants broach uncomfortable subjects in an unbiased way.

However, a consultant who takes on too much responsibility can hijack the process as well as steal credibility from your internal team.

Here are tips for hiring strategic planning experts *while staying in the driver's seat*.

**First**, you or your internal team should shape a framework for the planning process. **DO** take the lead in defining goals for your strategic planning process, developing a few ideas for each component, such as guest speakers and break-out discussions.

After all, you know your company's culture – what will fly, and what will not. Then, you'll be ready to vet the ideas with your hired consultant.

## ***Consultants running amok: One company's "big-tent horror story"***

A large company hired a consultant firm to guide major change initiatives and a strategic planning process. This consultant was given full reign to oversee the program with minimal engagement from the senior executive team.



The consultants steered the entire multimillion dollar process, recommending a lavish "tent meeting" complete with national speakers and promotional slogans. Following the planning session, the company came under public scrutiny for wasting resources and engaging in a gigantic "hype session" with little documented progress to follow. The strategic plan became a shelf ornament, lacking internal buy-in. The company lost both employee and external constituent credibility. Lesson learned: Strategic planning consultants work best when executive leaders are fully engaged.

## **A blueprint for engaging a strategic planning consultant**

**First**, as you consider hiring a strategic planning expert or planning firm, look for solution provider who fits perfectly with your firm's culture. Verify credibility and effectiveness by checking references. Your

candidate should have a track record for delivering both a result-oriented strategic plan as well as developing a process that helps you build greater teamwork and participant engagement. The planning process is just as important as the final product!

**Second**, either directly oversee your consultant's work, or assign someone from your team to be the go-to source for all decisions associated with your company's strategic planning process. Make sure that all activities recommended by your consultant have executive management's full support.

**Third**, after a blueprint for the strategic planning meeting(s) has been developed, determine the best use of your staff, versus where your consultant could be most useful.

For example, prior to the first meeting, your staff may be extremely useful in researching industry trends and competitive threats, while a consultant might serve as:

- ✓ A sounding board to help you add facilitation structure and content ideas for your strategic planning meetings, based on the goals for the session and outline that you develop.
- ✓ A facilitator for some, or all meeting discussions, with your executive team playing certain roles.
- ✓ A trusted advisor for helping you develop next steps, including tracking results.

**Finally**, be sure that the service contract for your consultant clearly reflects your company's expectations for the strategic planning process as well as planning outcomes. Monitor results and provide feedback to your consultant after each planning session.

**Poore & Associates looks forward to sharing these and other exciting topics:**

- ✓ How tracking your strategic plan actually can be fun!
- ✓ Taking a social approach to strategic planning.
- ✓ Strategic fundraising: Outside of the box development to engage your company and your constituents.
- ✓ Your investment "whys:" How to develop a compelling company story and case for support.
- ✓ Building your organization's diversified fundraising pipeline.

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