

Senior Peer Professionals Meeting in Review Strategic Planning with Margo Murray

The expertise and sparkling humor of **Margo Murray**, along with the additional insights offered by participants made our September Senior Peer Professionals meeting a big success. Ms. Murray's central theme of strategic planning via balancing concerns for quality, productivity, and people provided a foundation to the evening's discussion.

Ms. Murray emphasized using a forward and outward focus to examine the needs of the organization's stakeholders. Determining who has a stake in the organization and what they expect to get out of it leads to a more effective strategy for change.

Ms. Murray also raised the issue of the Human Resources Department's role in strategic planning. According to Ms. Murray, the H.R. manager should be part of the strategic planning process to align the organization's personnel needs with its business needs. The H.R. Department should pay attention to the bottom line and the business of the organization; otherwise, as Ms. Murray quipped, "OD will be viewed as the opposite of DO."

Ms. Murray laid out a six-step approach to strategic planning:

1) Analyze your stakeholders: (Who are they? What do they put into the organization? What do they expect in return?);

2) Create a mission statement: based on the organization's purpose, products, and/or services, customers/clients and scope;

3) Determine what values your team shares;

4) Examine the organizational culture: (Is the culture one that was put in place by the "founding fathers"? Is that still relevant?)

5) Identify the group's goals: (which will be influenced by what mode the organization is in: stable, growth-oriented or down-sizing);

6) Examine the organization's functions: determine what is needed based on 1-5 above.

A discussion of the importance of the individual in organizations ended the evening. Employees must be provided an opportunity to align their own goals and values with those of the organization to avoid gaps in the strategic planning process. Ms. Murray suggested a monthly (or at least quarterly) meeting to realign team members' objectives as needed.

Once again, our thanks to Margo Murray and our participants for a very rewarding evening.

