

Working Together and Making It Work: Basic Human Needs and the Strategic Planning Process.

By Sharon Bowman and Laura Moriarty

Sharon L. Bowman, MA
Professional Speaker and Corporate Trainer
Director, The Lake Tahoe Trainers Group

P.O. Box 564, Glenbrook, NV 89413
Phone: 775-749-5247 Fax: 775-749-1891
E-Mail: SBowperson@aol.com Web-Site: www.Bowperson.com



It's the stuff of dinner table conversations: *"And then he had the nerve to tell us we didn't understand anything ... She pretended to agree but went ahead and did it her own way ... He just got up and walked out ... When she heard an idea she didn't like, she came back with a sarcastic remark of her own."*

The high drama of your company's strategic planning meeting. The clash of wills, the subtle sabotage of the silent veto. The emotional highs and lows. Makes for great stories, but doesn't get the job done - and definitely doesn't add anything positive to your business team or bottom line: profitability.

Especially now, during the fiscal year's time of budget analysis, the strategic planning skills of business professionals are put to the test. How do you get folks to buy into a critical strategic process like budgeting? How do you build consensus? A shared vision? How do you communicate strategy?

If the truth be told, the answers to these questions rest not on the spreadsheet numbers or the specific planning strategies, but on the interpersonal skills of those involved in the process. Business

professionals who understand basic human needs will have far more success in strategic planning than those who don't. According to Larry Bossidy and Ron Charan, authors of *Execution: The Discipline of Getting Things Done*, "The people process is more important than either the strategy or operation process. If you don't get the people process right, you will never fulfill the potential of your business." Like it or not, profits are tied to people - it's that simple. And people can - and do - make or break a business.

Here are some of those basic human needs that are crucial to the people process part of strategic planning. Possess them and your company is strong enough to successfully navigate any change process, budget or otherwise. Lack them and your business is in constant danger of floundering on the rocks of misunderstanding, resentment, and subtle sabotage.



TRUST OR BUST

In his book *The Tom Peters Seminar: Crazy Times Call for Crazy Organizations*, Tom Peters identifies trust as the crucial foundation piece of any strategic planning process. "Adding trust is the issue of the decade ...and there is no such thing as 'half-trust.'" You either trust someone else, or you don't. In his sequel, *The Pursuit of Wow*, he sums it up: "T-R-U-S-T. It's the single most important contributor to the maintenance of human relationships. And for a business, it can, quite simply, mean the difference between success and failure."

If your business is an emotionally healthy one with a successful team of co-workers, trust translates into such behaviors as: being able to challenge and disagree with each other, admitting mistakes, offering and accepting apologies without hesitation, asking for help, giving each other the benefit of the doubt, taking risks, offering and accepting feedback, listening without judging, telling the truth, and recognizing and appreciating each other's skills and contributions.

A lack of trust is evident when there is sarcasm, back-biting, the "silent veto," saying one thing and doing another, overt or cov-

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ert “put-downs,” or the “my-way-or-the-highway” approach to anything. For all of us, trust is about psychological safety, even during times of change, stress, disagreements, and strategic planning.

Try This: Privately list the people in your life that you trust - really trust. Then list the characteristics that make them trustworthy. Are any of those folks the ones you work with? If not, why not? What would it take for your manager, colleague, or employee to earn your trust? What would it take for you to earn their trust? Could your business do this exercise as a group? What might the results be?

**FIRST BELIEFS,
THEN BEHAVIORS**

We all need to belong, to feel included, and to know that our opinions matter. These are basic human needs, and we don’t leave them at home when we walk out the door to work.

One of the most powerful ways your business can meet the need for inclusion is to involve every employee in the strategic formation of basic company beliefs, i.e. what everyone believes to be true about the company. Beliefs are one of the most important cor-

nerstones of the corporate culture. Beliefs can be as simple as:

- In our company, we make expectations clear for everyone.
- In our company, we commit to and hold each other accountable for our yearly goals and objectives.
- Collaboration is the key to our success.
- We are able to disagree with each other and still work productively together.
- People want to work with us because they always get great value and great service.
- We look for ways to add value to everything we do.

Once everyone has been included in creating the company beliefs, the behaviors that follow will more likely be in line with these beliefs.

Try This: Together with your co-workers, brainstorm a list of 8 - 10 beliefs about your company. Ask for both positive (“Our company always gives value-added service to the customer”), and negative (“Our company doesn’t always trust employees to do the right thing”). Can you

openly discuss the negative ones and change them to positive goals? Can you tie specific work behaviors to each belief so that everyone knows how to “walk the talk”?

FROM THE “WHY” TO THE “HOW”

“That’s all well and good,” you might say, “But what about the new employees who are hired after the strategic planning session is over?” Even when your new team members haven’t been in on the ground floor of your company’s planning, letting them know the “why” behind the decisions that have been made is crucial to their executing the “how.”

Just as behaviors are driven by beliefs, actions are also driven by an understanding of what has gone before. People will usually move to necessary and appropriate action once they know why that particular decision was made in the first place. And knowing the “why” makes them part of the loop - that feeling of inclusion again, and a crucial aspect of trust.

Interestingly enough, when you and your co-workers discuss the “why” behind a decision, oftentimes the “how” changes as open dialogue leads to more creative and efficient ways of reaching

the same goal. Peters calls this “work as conversation ... conversations are the way workers discover what they know, share it with their colleagues, and in the process, create new knowledge for the organization.”

Try This: Chat with a few of your new employees about some of your company’s past strategic planning decisions. Ask for their input and see where the conversation goes. Be open to new ideas. Give credit to others for their ideas and contributions, even if they aren’t used by your business. Above all, keep all your employees in the loop, explaining the “why” behind the policies already in place.

COMMITMENT – NOT CONSENSUS

In consensus, as in compromise, there’s always a winner and a loser. Oftentimes, everyone leaves the table a bit diminished by the process. When team members in your business agree to disagree, and then search for what National Geographic photographer DeWitt Jones calls “the next right answer,” the result is a synthesis of all the best ideas into a solution that is right for the moment. *And not all team members may agree with the result.* Patrick Lencioni, in his book *The Five Dysfunctions of a Team*,

tells us to “Disagree and commit - you can argue about something and disagree, but still commit to it as though everyone originally bought into the decision completely.”

Bossidy and Charan go a step further: “Harmony - sought by many leaders who wish to offend no one - can be the enemy of truth. It can squelch critical thinking and drive decision-making underground. When harmony prevails, here’s how things often get settled: after the key players leave the session, they quietly veto decision they didn’t like but didn’t debate on the spot. A good motto to observe is ‘Truth over harmony.’ Candor helps wipe out the silent lies and pocket vetoes, and it prevents the stalled initiatives and rework that drain energy.”

Try This: As a team, brainstorm and list all the pros and cons concerning the strategic planning piece you’re working on. Also list all the agreements and disagreements. Make sure each person’s opinion is treated with respect, even if he or she disagrees with the majority opinion. When your team reaches its final decisions, record the dissenting opinions (much like the U.S. Supreme Court does). If your team members trust each other and are operating from a set of agreed-

upon beliefs, those who disagree will still commit to the strategic plan for the good of the company. How do you know when they have done so? By their actions. Their behavior will be congruent with their commitment.

PROCESS - NOT PERFECTION



Linguist Deborah Tannen, in her book *That’s Not What I Meant: How Conversational Style Makes or Breaks Relationships*, reassures us that “the problem is the process,” i.e. we communicate through a series of “mistakes” - much like filmmakers do when they shout, “Take one, take two ...” We try to get it right. We try to get our point across. Not all of what we try works. Sometimes some of it makes sense to some folks but not to others. And the frustration we feel is really about the process, not about the others involved in it.

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So perfection is not the goal in the strategic planning process. The process becomes the learning tool and, as long as progress is being made, the bumps along the way aren't setbacks but opportunities for new thinking and growth. In fact, Henry Mintzberg, in his book *The Rise and Fall of Strategic Planning*, tells us to be "finders rather than designers" of strategy and process. Healthy companies pay attention to the flow of the process and change midstream when necessary, always looking out for both the unexpected obstacles and serendipitous gifts along the way.

Try This: With your co-workers, play with "what - ifs." What if you embraced the opposite decision? What if you came up with three planning decisions instead of one? What if you had to find a totally different solution than the one agreed upon? What if you applauded the obstacles as much as the smooth road? What if you made a list of everything you've learned about yourself and each other since the planning process began?

POST SCRIPT

Someone wise once said, "Nothing works all the time." Sometimes we truly have to let go of all we know and fly by the seat

of our pants - praying the entire time!

But when we, as business professionals, understand the basic human needs that drive our behaviors and color our conversations, we can begin to engage in discussion, debate, and strategic planning in a more honest and open fashion. From mutual trust and shared beliefs, inclusion in the process and understanding the "why," we get commitment and behaviors that help our businesses move forward in profitable and positive ways. And what could be better than that?

Sharon Bowman, a professional speaker and corporate trainer, works with educators and business people who want to improve their information-delivery skills. She offers both public and in-house communication and train-the-trainer programs. She is the author of six popular training and motivation books, a member of the National Speakers Association, and the director of The Lake Tahoe Trainers Group. Log onto her web site at www.Bowperson.com for more information about her books and services. You can also email Sharon with questions and comments at Sharon@Bowperson.com.

Laura Moriarty is the Vice President of Human Resources and Training for Booth Creek Ski Holdings, Inc. During her career as a Human Resources generalist, Laura has held management positions in the ski, hotel, resort and gaming industries. Laura leads community workshops and provides con-

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sulting services to enhance organizational and individual effectiveness in management and leadership practices, customer service, training & development, employment practices and employee relations coaching and counseling. For more information, email Laura at LBMORIARTY@aol.com.

Both Laura and Sharon work with companies and organizations that want to create exemplary customer service through designing, developing, and delivering great training programs.

Cited Resources:

Larry Bossidy and Ron Charan.
Execution: The Discipline of Getting Things Done.

Patrick Lencioni. ***The Five Dysfunctions of a Team***

Henry Mintzberg. ***The Rise and Fall of Strategic Planning.***

Tom Peters. ***The Tom Peters Seminar: Crazy Times Call For Crazy People.***

Tom Peters: ***The Pursuit of Wow!***

Deborah Tannen. ***That's Not What I Meant: How Conversational Style Makes or Break Relationships***
