



Strategic Planning

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Discuss critical steps to an effective strategic planning

Strategic Planning

SWOT Analysis

Generally, there are several critical steps to an effective strategic planning. Most important is the SWOT analysis, where the members of your management group or team attempt to identify the assets and liabilities of the organization as they look to the future. This is the first step toward creating that shared vision that is so critical to your ability to lead.

SWOT stands for the strengths, weaknesses, opportunities, and threats facing your company. The strengths and weaknesses are usually considered to be internal, while the opportunities and threats are generally external to the company. This analysis helps you ask yourself, “Where are you now?” This is really your situation analysis or inventory, and it gives you an opportunity to take stock of the overall situation right now before planning any future changes.

	<i>INTERNAL</i>	<i>EXTERNAL</i>
<i>POSITIVE</i>	Strengths	Opportunities
<i>NEGATIVE</i>	Weaknesses	Threats

A SWOT analysis should consider:

- Your company and its strengths and its weaknesses
- Your products and/or services and their strengths and weaknesses
- The community and what is currently going on that may affect future planning
- Your primary and secondary target markets and what they want/need
- The competition and what they are doing
- The external forces that will affect your business

- Opportunities that are available to you and your company
- Environment and market factors that could threaten your business

Individual Analyses

	<i>INTERNAL</i>	<i>EXTERNAL</i>
<i>P O S I T I V E</i>	Strengths	Opportunities
<i>N E G A T I V E</i>	Weaknesses	Threats

Doing Delegation Right

What is Delegation?

Effective delegation is one of the most valuable skills a manager can master. It reduces a manager's workload and develops employee skills. Delegating prepares employees who work for you to be able to handle your responsibilities and simultaneously allows you to advance to other career opportunities within your organization.

The essence of supervision and management is getting work done through the efforts of others. Therefore, the supervisor or manager can decide (and must decide) what they are responsible for directly (those things they cannot delegate and empower others to do) and what others can do. They still maintain the authority, but they have passed the responsibility to someone else. They have empowered them to do those things.

Delegating involves trusting someone else to do a task for which you will ultimately be held responsible. It is not giving them tasks to do. Rather, delegation is systematically delegating whole jobs to people who work for you.

What is responsibility?

What is accountability?

Group Definitions

Identify the advantages of becoming a good delegator.

Identify the concerns that keep you from delegating tasks.

Identify the types of jobs that can and should be delegated.

Identify jobs that managers should not delegate to others.

Identify the signs that tell managers they are not delegating properly.

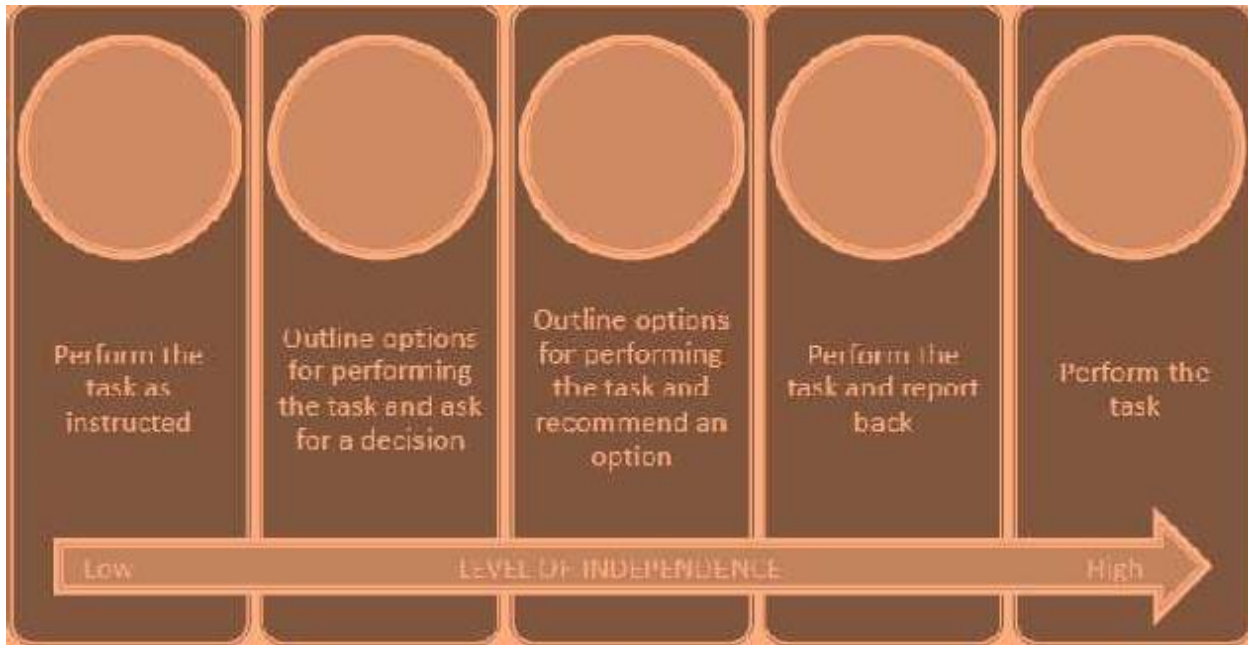
Identify some reasons why employees may be reluctant to accept assignments that a manager has delegated.

Levels of Delegation

The Five Levels

Delegation doesn't have to be all or nothing. In fact, you should consider what level of delegation is appropriate for the task, the employee, and the situation.

Here is an overview of the five levels of delegation:



Breaking Down the Model

Let's say that we want an employee to prepare a summary report of their work over the past year that will be submitted to the executive team. How will each level of delegation look?

The **first level of delegation** is to have the employee perform the task exactly as instructed with no independence. In our example, we might give the employee a report template, the data, and similar reports. Then, we'll ask them to complete the report and submit it by a certain date.

The **second level of delegation** is to allow the employee to do some research (if necessary) and then give you options for the task. You make the decision and the employee completes the task according to your instructions. In our example, the employee might research different formats and give you some different options. They may also draft a list of items that they want to include in the report. Then, you will outline the format and contents for them. They will complete the report and submit it by a certain date.

The **third level of delegation** is similar to the second, except that an employee makes a recommendation. Continuing with our report example, the employee would recommend a format and possibly prepare an outline. You would approve it and ask the employee to complete and submit the report.

The **fourth level of delegation** is where independence really comes into play. This is the level that you will use most often once team members get up to speed. With our report example, you would simply ask the employee to complete the report and submit it by a certain date. (They may use existing procedures or templates, but the bulk of the decisions are up to them.) You would then review the report, approve it, and send it to the executive team.

The **fifth level of delegation** gives the employee complete freedom. With our report example, you would ask the employee to complete the report and submit it directly to the executive team. You may ask the employee to send you a copy of the report, but you would not have any active role in it.

Delegation Role Plays

Delegator

Assume you are going on a four-week cruise vacation. Your manager has made it clear that in order to get so much time off you must train somebody else to do your job in your absence. In a short role-play, go over several of the most important tasks that he/she will be performing in your absence.

You may choose to teach any relevant tasks, such as how to complete a report or run a machine. Your goal is to teach this employee how to perform several tasks that will be delegated to him/her in your absence. You may do this in any way that will be comfortable for you.

Observer

While the delegator gives his/her instructions to the delegate, watch the interaction.

What improvements could be made on both sides?

Further Reading:

- ✓ *Strategic Planning,(2010), By George A. Steiner*
- ✓ *Strategic Planning: A Practical Guide to Strategy Formulation and Execution,(2011), By Byron K. Simerson*

