



Human Resources

UNIVERSITY OF COLORADO **BOULDER**

Strategic Planning

Moving your team toward a vision for tomorrow

Mike Murray

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Department of Human Resources

Be Boulder.



University of Colorado **Boulder**

Presenter Bio

Mike Murray serves as the Assistant Vice Chancellor of Strategic Initiatives in CU Boulder's Department of Human Resources where he works across campus and at all levels to increase institutional alignment and operational effectiveness.

Additionally, Mike is the Founder and Principal Consultant at Perspicuity, LLC, a human resource and organizational development consultancy, focused on bringing clarity and pragmatic solutions to complicated business problems. Perspicuity's clients have included Rally Software (Computer Associates), Datalogix (Oracle), Accuvant (Optiv), and Tendril Networks.

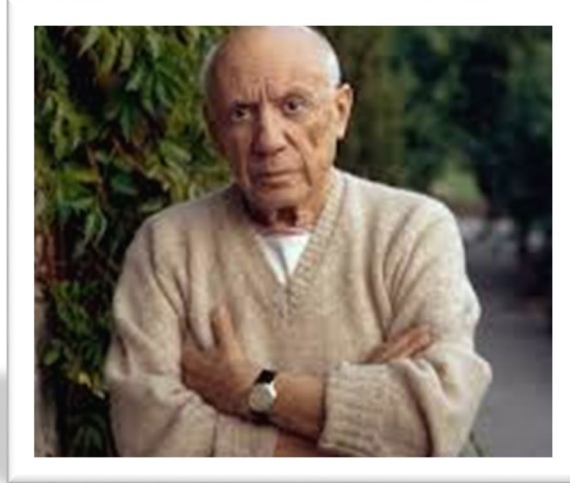
In both of his roles, Mike combines his experience and deep functional knowledge with the down-to-earth approach for which he is known; to help executive teams, business leaders, and managers clearly define what they want and how to get it. He excels at understanding diverse perspectives and bringing people together in support of common goals aligned to business strategy.

Prior to founding Perspicuity in 2009 and coming to work with the University in 2013, Mike gained 20 years of global HR/OD experience working in leadership positions at Fortune 500 companies including Amoco, Ford, Sun Microsystems and Covidien.

Mike holds a Master's in Labor Relations & Human Resource Management and a BA in Marketing, both from Michigan State University.

Workshop Objectives

- Highlight why strategic planning matters
- Define the essential elements of a strategic plan
- Outline common pitfalls and frustrations
- Provide a framework to get started



“Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success.”

-Pablo Picasso

A Planning Process to Facilitate Change



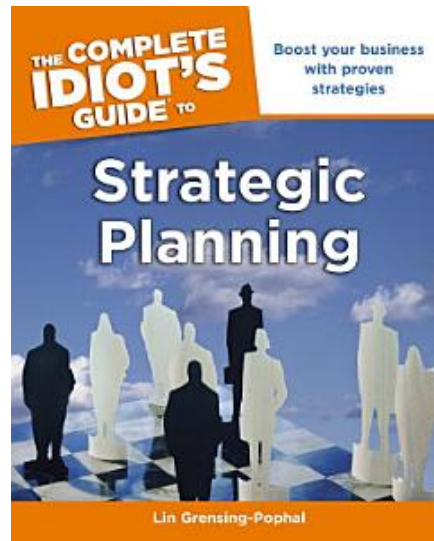
**Current
State**

**Transition
State**

**Future
State**

A Formal Definition

*A **strategic plan** is a document that outlines the steps that an organization, division, or department will take to achieve an overall goal or vision.*



Essential Elements of an Effective Plan

- **Purpose Statement:** outlines the reason your organization exists. It answers three questions: What do we do? How do we do it? Who do we do it for?
- **Vision:** not an empty statement of ideals, but a statement of how we define our success. The vision is a word-picture of where we will be in 10 or 15 years.
- **Mission:** a statement about what milestone(s) we will accomplish and measure over the next three to five years in order to make progress toward the vision.
- **Strategic Intent:** when measures are in place, we compare actual performance to what is needed to achieve the vision. The large gaps we decide to target as objectives or policies are defined as “strategic intents”.
- **Objectives:** in order to achieve a given strategic intent, there will be multiple objectives, both strategic and tactical, that need to be accomplished.



Meet Riley

- Riley has a **Vision**. In 16 years, she wants to be a practicing neurologist. She is a little overwhelmed at how much is involved and what it will take to **become a neurologist** from where she is today.
- Riley's counselor at school helped her break it down a little by suggesting she set a **Mission** for herself every four years. Her first mission, to **do well enough in high school to get accepted into a premier university with a competitive pre-med program**.
- To **do well enough in high school**, Riley decided to focus on the 3-4 most important things she would need to do over the next four years to fulfill her mission. Her mom told her that at work, they call these types of things **Strategic Intent**s. Riley decided her four strategic intents were to:
 - Intent 1: Take challenging classes**
 - Intent 2: Get good grades**
 - Intent 3: Do well on the ACT**
 - Intent 4: Get involved in things that would distinguish her among her peers**
- In order to achieve these intents, Riley knew that she would have to accomplish some **Objectives** for each:
 - Objectives 1: Meet with counselor, take prerequisites, review college admissions requirements**
 - Objectives 2: Buy supplies, attend class, study hard, get a tutor, go to office hours**
 - Objectives 3: Sign-up for the test, buy a review book, take a course, do practice tests**
 - Objectives 4: ID interests, learn how to get involved, meet requirements, go to meetings**



CU Boulder Athletics Strategic Plan

<https://cubuffs.com/news/2020/7/9/general-2021-23-strategic-plan.aspx>

Questions

Values, Culture, Climate

We get what we measure, reward, and reinforce

- **Values** drive our Culture & Climate.
- **Culture** is a set of shared assumptions and beliefs that governs how we behave.
- Culture drives **Climate** which is how people experience the Culture.
- Simply:
 - **Culture** refers to “the way we do things around here”
 - **Climate** refers to how “the way we do things around here” makes me feel.

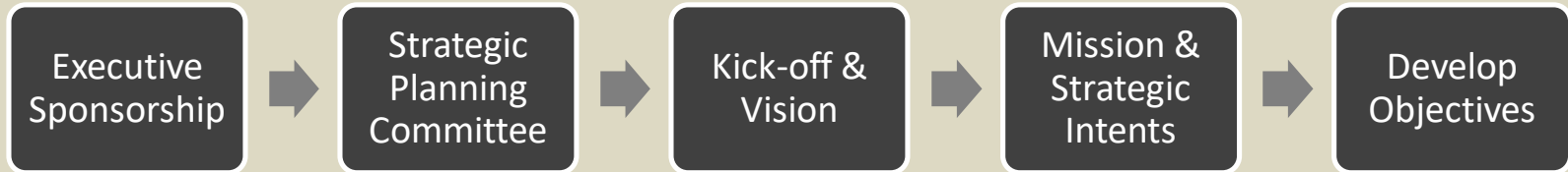


“Knowing what must be done does away with fear.”

-Rosa Parks

Strategic Planning Process

[Colorado.edu/chancellor/strategic-plan](https://colorado.edu/chancellor/strategic-plan)



Input – Feedback – Socialization – Input – Feedback – Socialization

Functional Review

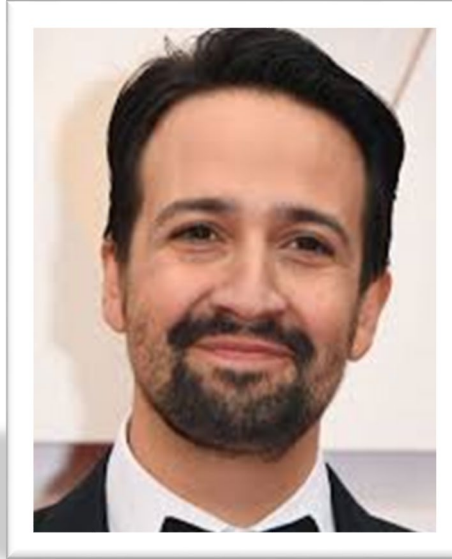
Approvals & Agreements

Implementation

Execute – Monitor - Adapt



- Have your manager charge you and the strategic planning committee (SPC)
 - Why is a strategic plan needed?
 - What is the leader working to accomplish?
 - What do they want in terms of output and when do they want it?
 - How do they want to be kept informed of progress?
- What is within your span of control and what is not
- Ask what your leader is willing to commit to
 - Resources
 - Participation
 - Bringing in others
 - Advocacy



“I need someone like you to lighten the load.”

-Lin-Manuel Miranda



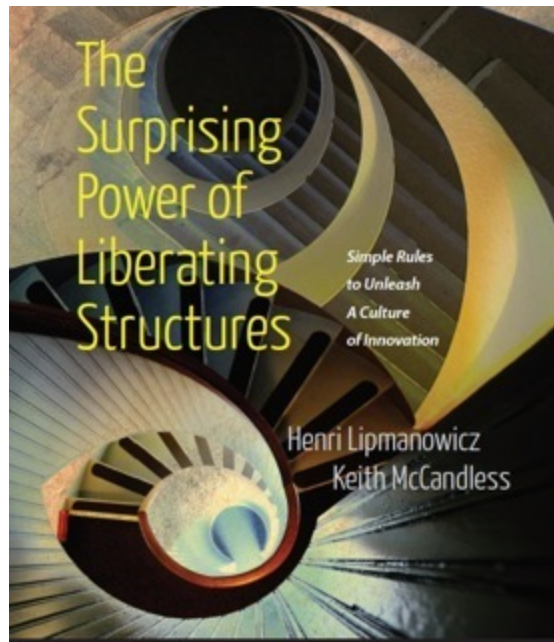
- Roles & Responsibilities

- Team Lead
- Facilitator
- Note Taker
- Administrator
- Governance & Decision Making

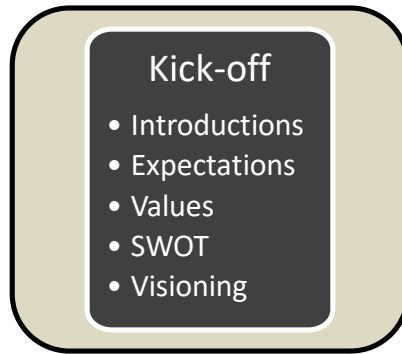
- Membership

- Credibility with others
- Willingness and ability to advocate for the plan
- Time and availability
- **Ability to understand perspectives broader than their own**
- They value disagreement without discord
- Inclusive approach to participation

The Importance of Facilitation



LiberatingStructures.com



- Why do we exist?
- What do we value?
- What makes us unique?
 - Strengths
 - Weaknesses
 - Opportunities
 - Threats
- What do we want to be, become, be known for?



“Find out who you are and do it on purpose.”

-Dolly Parton



- Measure where we are today vs where we need to be
- Focus on those things that are going to have the biggest impact on closing that gap 1-2 years at a time



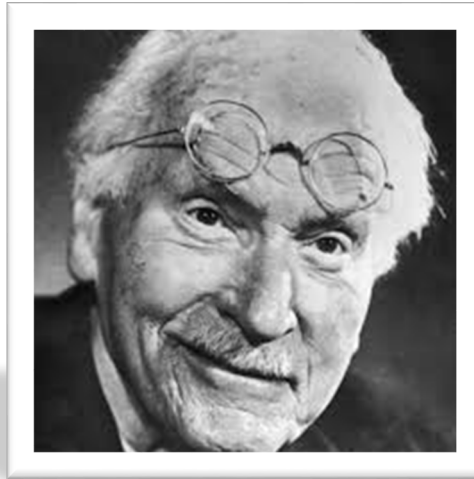
“The essence of strategy is choosing what not to do.”

-Michael Porter



Strategic Intent One

Objective	Priority H,M,L	Effort H,M,L	Current State	Resources Required	Dependencies	Timing	Owner
Obj 1							
Obj 2							
Obj 3							
Obj 4							
Obj 5							



“You are what you do, not what you say
you’ll do.”

-Carl Jung

In Summary

- Be honest about who you are
- Articulate who you want to become
- Identify the steps needed to close the gap
- Take those steps and eliminate movement without purpose
- Analyze the result
- Rinse & repeat

Questions