

## **Implementing Planning in Reverse in strategic business, education and public leadership courses**

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### **Abstract**

The purpose of this paper is to provide a pathway for instructors and presenters to implement the Planning in Reverse process. This process is a much needed component that should be added to administrative and management classes in business, education and public administration. The changes in the economy have caused a fundamental need to alter the way organizations approach the strategic planning process. The focus of organizational leaders and its member stakeholders can play an important role in the success of the organization by utilizing this new procedure to maintain viability of an organization. A practical approach to employee involvement at a commitment level that is achievable by all organizations will be discussed. Finally, an outline that can be utilized to incorporate Planning in Reverse as a module in an existing business, education or public administration courses is included.

Keywords: strategic planning, executive leadership, viability, employee engagement



## Introduction

The purpose of this paper is to provide a helpful process to include the newly created *Planning in Reverse* process in curricula where it is appropriate. This new strategic planning process may be essential to the future health of organizations as the economic uncertainty of recent times continues. By understanding the *Planning in Reverse* process faculty members and workshop presenters will understand how to properly incorporate the new process into existing courses and presentations on strategic planning and strategic leadership. This, in turn, will then adequately prepare students to embrace the new process that may become the standard in the strategic planning process.

The process is a needed addition for organizations in all disciplines to better address the escalating rate of change. Essential to K-12 education settings, colleges and universities, small and large businesses and governmental and not for profit agencies for improved awareness, it allows the inclusion of all stakeholders. Implementation is surprisingly easy and can be completed with little cost to the organizations. Individuals departments may benefit from implementation within a segment of an organization.

Training to provide a change in the way leadership views “change” may be the most expensive component of converting to the *Planning in Reverse* process. Ultimately, even this cost is minimal. For most of the stakeholders, their involvement will require implication scans which take little time but can become extremely valuable to the organization. *Planning in Reverse* is a needed change in the way organizational leadership completes strategic planning.

## Background

Strategic Planning has been the tool utilized to formulate order for an organization to move forward. It is a plan that sets up goals and objectives that drive an organization towards fulfilling its mission. In the past long term strategic plans were typically five to ten years. These plans were often static with little flexibility (Ballantyne, Berret & Wells, 2011). A trend has begun to develop whereas strategic plans typically cover three to seven years. Many organizations have implemented very sophisticated strategic plans. In addition, there are many organizations that have not implemented sophisticated strategic plans, in both cases organizations have succeeded and failed with and without strategic plans (Ballantyne, Berret & Wells, 2011). This phenomenon posits the idea that strategic plans may lack a fundamental component that helps organizations succeed. What causes these organizations to succeed or fail with or without strategic plans? Change is the answer.

These organizations may have not reacted as quickly as they should have based on rapid change that affected their organizations. The rate of change is increasing exponentially leading to the new reality that the 21<sup>st</sup> century will be equivalent to 20,000 years of progress at the current rate of change (Kurzweil & Meyer, 2003). This acceleration of the rate of change can be identified as a new deficiency in the long term strategic planning process. Coupling the accelerating rate of change with the change in economic conditions has caused the traditional static strategic plan to become compromised as a guiding plan for organizational success.

Leadership skills need to be enhanced. With the change in economic conditions along with the acceleration of the rate of change, an enhancement to current leadership practices is needed. This enhancement is necessary so that *Planning in Reverse* can be successfully implemented into organizations thereby improving the opportunity to sustain organizations by

returning the strategic planning process to a viable planning tool. The most important skill to enhance when making the switch to *Planning in Reverse* is listening. It is important to recognize that plans do not accomplish anything, people accomplish the necessary items that make organizations successful (Musso, 2011),

## Planning in Reverse

Planning in reverse is a process. It was developed so that organizations can effectively utilize “change” to their advantage. The long term strategic plan develops deficiencies due to the accelerating rate of change. *Planning in reverse* incorporates the change into the strategic planning process. It accomplishes this task through the *i-process* which provides a model to implement adjustments based on *implication scans*. *Implication scans* are the initial step in the *Planning in Reverse* process. (Ballantyne, Berret & Wells, 2011). *Implication scans* are observed and reported by all stakeholders associated with the organization. This is where the initial observation, collected by a stakeholder, is processed to determine the affect they may have on an organization.

These scans are never summarily dismissed. Each scan receives the same initial review. If the committee does not believe the scan reaches the level of *impact* it is not categorized, it is closed and no further consideration is required. *Implication scans* that do reach the level of *impact* are further defined as an *internal* or *external*. An *internal impact* is one in which the change scan affects operations within the confines of the organization. An *external impact* is one that affects the organization but is driven by outside forces exerted on the organization (Ballantyne, Berret & Wells, 2011). These *impacts* are then further delineated into *improvements* or *impediments* by a committee designated to review all *implication scans* (Ballantyne, Berret & Wells, 2011).

This is an area where transparent communication is necessary. Everybody in the organization needs to know the status of each scan as it proceeds through the *i-process*. Transparency and effective two way communication must be started no later than the *impact* level, preferable it should start at the *implication scan*. (Ballantyne, Berret & Wells, 2011).

As the *impact* is formulated into an *improvement* or an *impediment*, an *itemized action plan (IAP)* is developed (Ballantyne, Berret & Wells, 2011). This plan will include a series of recommendations that will be utilized to take advantage of the affect that the indicated change may have on the organization. The organization will rely on this plan as the basis for moving forward.

After completion of the *itemized action plan*, the plan moves forward in the *i-process* for *implementation*. *Implementation* is the process whereas timelines and assigned responsibilities are received. The *implementation* process begins to assemble the cost and timelines necessary to harness the positive benefits of an *improvement impact*. Conversely, it has the same effect on an *impediment impact* except that the motives are to limit the negative *impact* on the organization (Ballantyne, Berret & Wells, 2011).

*Integration* is the next step in the *i-process*. *Integration* is the process of changing the culture to accept the “new” method or procedure being *implemented* into the organizational processes. *Integration* requires the inclusion of all peripheral stakeholders that will be affected by the new process (Ballantyne, Berret & Wells, 2011). It is at this point that additional valuable information is learned from the stakeholders. Alterations prior to *initiation* may be necessary as

individuals begin to understand what needs to change to accommodate the new process or procedure. Revisions are acceptable if the revisions will benefit the organization.

Finally, *initiation* begins. *Initiation* is the final step in the i-process. It is the complete *integration* of the necessary changes to move the organization forward. With *initiation* the process is complete for this particular *implication* scan. The process is circular however, so it is a continuous process of scanning by stakeholders. These short term adjustments are needed to improve the chances for long term viability (Ballantyne, Berret & Wells, 2011).

### Teaching Planning in Reverse

Planning in Reverse can be revealed through several different techniques. The least intrusive may be to simply place the book that explains the process on a required reading list for students in certain courses. For business students, strategic management courses are most appropriate. For education courses, school administration classes that deal with strategic planning are most appropriate. For public administration and not for profit programs, courses directed at strategic leadership are most appropriate. While this will make students aware of the new process, it will not provide an interactive experience that allows a more intensive experience.

Inclusion in existing courses is a potential compromise that will provide students with the opportunity to have a more robust approach to *Planning in Reverse*. The suggested approach is to require students to read several chapters of the book prior to the assigned class period. The class period will require a general discussion on the chapters covered and a question and answer period. As students begin to grasp the concept a simulation based on *implication scans* can be very beneficial for student understanding. If this method is utilized, four to eight hours of instruction may be adequate. Adjustments in time requirements can be made by the professor as familiarity with the content begins.

The best opportunity for complete understanding and effective comprehension is developing a full course on *Planning in Reverse*. The book is relatively inexpensive and easily understood. It is not a very long read so it is easy to complete the book in any hybrid model course design. The key to understanding *Planning in Reverse* is to include an experiential component. Experiential learning provides an additional component to the course that will help students more fully understand the concepts discussed in the book (Kolb, 1983). Students should be encouraged to select a potential company and then employ the techniques associated with *Planning in Reverse*. As students begin to create implication scans, the i-process can be continued so students can see how a tiny clue can require major restructuring within an organization. At this point, students will gain confidence in their ability to strategically lead an organization in this time of change.

Finally, workshops and presentations provide an introduction to *Planning in Reverse* or in an ideal situation, provide an opportunity for students to discuss their understanding with one of the authors that created the *Planning in Reverse* process. These workshops can be set up via access to the *Planning in Reverse* website at [www.planninginreverse.com](http://www.planninginreverse.com). These workshops and presentations make excellent keynote speaker presentations for business and school organizations as well as student organizations and groups.

Partial and full sample syllabi are included as a resource for potential course leaders and professors to help in the inclusion of *planning in reverse* in the curriculum at the website ([planninginreverse.com](http://planninginreverse.com), 2010). These syllabi are available free of charge. In addition,

periodically checking the website is helpful in teaching the *Planning in Reverse* process. Additional resources will be posted on the website as new materials are released. Access to the authors is possible through the website. The authors will provide timely responses to questions regarding the process. Students and faculty are encouraged to provide any examples utilized in the instructional process so they can be shared with other interested parties.

## Summary

Planning in Reverse is an innovative new process that may replace traditional static strategic planning in small organizations and will enhance the strategic planning process in larger organizations (Ballantyne, Berret & Wells, 2011) Planning in reverse is necessary in all organizations. The effect of change and the increasing rate of change have caused a need to fundamentally alter the process used by organizations to remain viable into the future. Combining the change factor with current economic realities requires organizations to be proactive in addressing issues which effect the operation. This is handled best by including all stakeholders in the process of creating long term viability. *Planning in Reverse* is the answer to this new reality in which organizations operate. Perhaps, this process will improve the opportunity to be successful for all organizations and strategic planning will become a more fluid tool.

## References

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