

By Trevor Tkach

# Is Your Strategic Plan Working for You?

Does your organization have a strategic plan? For most of you, the answer is probably no. For those who say yes, I'll bet you would be challenged to explain it to me. Strategic plans, like mission statements, vision statements and organizational values, are often tucked on the shelf collecting dust.

For business strategy purists like my graduate class professors, a strategic plan has a very specific framework. Frankly, in my experience, an overly structured, overly analytic approach to strategic planning can inhibit creativity and ultimately produce an end product that is emotionless and forgettable – no offense to my fellow MBA graduates. Objectives, action items, strategies, tactics, and many other strategic planning terms can make the document confusing, impersonal, and ultimately unbearable. Chances are, if you actually do have a strategic plan right now, I just described it.

What you need is something memorable. What you need is something amazing. A plan that is exciting and meaningful. A plan that motivates, empowers, and inspires. It's not easy to make a strategic plan that can do this, but the National Cherry Festival did. Festival organizers cracked the strategic plan code and I'm optimistic I can help you do the same.

I wish I could say it was an easy process, but for the National Cherry Festival it took many years to get to the strategic plan we have today. Early attempts produced the sterile results described above. The plan was thoughtful, but it was forgettable.

When I became interim Executive Director of the National Cherry Festival five years ago at the age thirty-five, the organization did not have a strategic

plan. Before I could officially designate as Executive Director, the Board of Directors required that the organization develop a strategic plan. The responsibility seemed ominous in light of the fact that I had no executive experience at the time and we were starting the strategic planning process from scratch. I brought in a facilitator, tapped into my MBA education, and rallied with the board to produce a comprehensive document that would serve as a compass of sorts for the next three years. I ultimately became Executive Director and carried the strategic plan like scripture into the future.

Unfortunately, it was long and complicated. Over a three-year period a plan with seven goals and thirty action items grew into twenty-five pages of content. Everything in the document was important, but it wasn't a strategic plan. It had morphed into an operational plan, a finance plan, a marketing plan, a public relations plan, a sales plan, an education plan and more. The strategic plan had turned into a catch-all for everything the organization was doing. It was not doing the job it was intended to do.

After the 2014 Festival, we were coming to the end of most of the items outlined in the strategic plan - a virtual culmination of three years of work. At that time the Festival was under extreme criticism for being too big, too commercial, and out of touch with the community. Elected officials were regularly attacking the Festival in the media and in the commission chambers. Additionally, many outspoken individuals from the neighborhoods of Traverse City, Michigan were sharing their dissatisfaction with the Festival. How could the Festival be in this situation? Shouldn't the strategic plan, our compass,

have led us to a more positive end?

To be fair to the strategic plan, it did lead us to what we were aiming for. Unfortunately, what we were aiming for wasn't appealing to everyone in the community of Traverse City. The 2014 Festival was a huge success by all of our traditional measures, but we were in damage control with the community because we had not listened to all of the voices when creating the plan. We had been listening very closely to our intimate stakeholders: customers, volunteers, and sponsors. And we had not spent enough time listening to our arms-length stakeholders: community members, local businesses, and city officials.

I'm sure Festival organizers could have dug in their heels at this point in time and gone to war with the community over what the Festival should look like, what it should be. But to what end? The mission of the National Cherry Festival is to celebrate and promote cherries, community involvement and the Grand Traverse region. The people criticizing the Festival represented at least two of the three things our mission called for used to honor. This criticism needed to be heard, respectfully and fully.

At the time, it was very difficult to listen to the criticism. But in hindsight, it couldn't have come at a more perfect time. Festival organizers were on the cusp of developing a new strategic plan. Feedback would be essential in crafting the new document. The outpouring of both positive and negative feedback was extensive and extremely public. This gave the Festival staff and directors a great deal to ponder and it held us accountable to a certain extent.

In addition to the tremendous volumes

of community feedback, Festival organizers had enlisted Grand Valley State University to do a comprehensive survey of festivalgoers and volunteers. The findings were extraordinarily insightful and uplifting. Satisfaction with the Festival was extremely high taking some of the sting out of the criticism that was being delivered simultaneously. The Grand Valley survey also gave us insights into what festivalgoers and volunteers valued most from the Festival. It informed us of both level of satisfaction and level of importance regarding specific facets of the Festival, providing deeper understanding of the participants' desires.

When the Festival staff and Board of Directors finally sat to develop the new strategic plan, we were equipped with a comprehensive package of information to reference. In addition to the community feedback and the survey information, we had debrief information regarding the operation of the 2014 Festival, financial reports, and of course the mission, vision, values and expiring strategic plan.

As apposed to the previous strategic planning process three year's prior, I did not bring in an outside facilitator. I facilitated the process myself. This was a risky move because my personal opinion could potential influence the overall process. On the other hand, my intimacy with the Festival made the process much more efficient and effective. Additionally, I made it a point to have all staff and board members participate in the process so that everyone would feel a sense of ownership in the outcome.

To ensure the planning was fluid and understandable, I used the most basic strategic tool I could to get the conversation going: the SWOT analysis. I had the board list the Strengths, Weaknesses, Opportunities and Threats they believed affected the National Cherry Festival. Nearly one hundred items were listed. Next, I gave each board member five votes to show what items they felt were most important. Twenty-eight items received at least one vote.

I took these twenty-eight items back to the Festival staff and we discussed what to do next. The staff concurred with the results of the SWOT. We also saw similarities between the items. They could be organized in different categories beyond just strengths, weaknesses, opportunities and threats. Some had to do with volunteers. Some had to do with financial sustainability. And some had to do with the overall operation of the Festival. Many of the items fit into multiple categories. Eventually, each of the twenty-eight items was assigned to one of three categories.

After some deliberation with the executive committee of the board and

the Festival staff, it was decided that the three categories would be three overriding goals of the strategic plan. They would be simple statements, easy to understand and communicate. These goals would be the memorable, meaningful pillars that would inspire and guide us into the future. The goals were as follows:

The National Cherry Festival will endeavor to be:

- A national festival that is local and personal
- Prepared for a rainy day
- Volunteer City, USA

A national festival that is local and personal was a goal that directly addressed the Festival's disconnect with the community. We didn't want to give up our national status and reputation, but we agreed that we could do a better job of focusing on the local talent and resources that make the Traverse City area so charming.

Prepared for a rain day is an idiom used by many to describe preparation for the unknown, but in the outdoor event business the statement is literal. The Festival has to develop new revenue streams, tighten financial controls, build cash reserves; do whatever it takes to stay in business for another mighty years.

Most importantly, Traverse City truly is Volunteer City, USA. In a city with a population of just 15,000 in a county with a population of less than 100,000, the Festival has more than 2,000 volunteers. Some of these volunteers literally take two weeks off work to share their time and talents with us. They are the lifeblood of the Festival and the ultimate ambassadors of Traverse City. We could not have a Festival without the volunteers.

Three simple goals – easy to remember. Sticky, vivid, understandable sentences with profound depth. The Board of Directors quickly embraced the goals, as did the staff. Fifteen action items were developed by the staff to pursue these three goals and organizers embraced execution of the plan immediately.

The creation of this strategic plan was unconventional, but it worked. The National Cherry Festival is a ninety-year-old, mission driven, non-profit organization in a small town in Northern Michigan and this strategic plan works. And the strategic process will continue to work if we recognize these four things:

1. Listen to every voice – often we focus on only our customer's feedback. To be successful you need to hear from everyone: neighbors, volunteers, kids, employees, community leaders – everyone. You won't be able to make everyone happy, but they will be happy that you listened and you just might

learn something from the exchange.

2. Make it memorable – Create goals that everyone can understand and remember. Make sure they have emotion and meaning that links back to your mission.
3. Pride in ownership – The people who are carrying out the plan need to feel like they own it. Make sure they are a part of the process. Create goals and action items that can be attained. Make sure everyone feels ownership and autonomy within the plan.
4. Work in progress – A strategic plan is not carved in stone. It should be updated regularly. If something needs to change, change it. If new feedback points you in a different direction, follow it. Don't follow an antiquated plan over the cliff.

Strategy exists in your organization regardless of whether or not you write it on paper. Everyone in your organization is making strategic decisions on behalf of the organization throughout the year. Do yourself and your organization a favor and develop a singular strategic plan that everyone can buy into and work from. It will improve efficiency and consistency in your organization and create a team environment with greater potential for success.

**Trevor Tkach** is the Executive Director of the National Cherry Festival and the Cherry Festival Foundation. He joined the National Cherry Festival in 2007 as the Business Development Manager and was named Executive Director in 2012. Tkach grew up in Traverse City, MI, attended Northwestern Michigan College, earned his bachelor's degree at Eastern Michigan University and received his MBA from the University of Michigan at Flint. Before The National Cherry Festival, Trevor served as Senior Account Executive for the West Michigan Whitecaps Baseball Team in Grand Rapids, MI. Tkach is a board member of the NMC BBQ, the Central Michigan University Parks and Recreation Advisory Board and committee member of the Michigan Tourism Strategic Plan Service Excellence Committee. An active member of Rotary, he is the chair of the Rotary Show ad sales and has been named to "40 Under 40" by the Traverse City Business News seven years in a row. Tkach lives in Traverse City with his wife Trisha and their three children, Lauren, Camden and Carson.