

Balancing Operational Issues and Strategic Planning



Dealing with operational issues while maintaining a focus on strategic planning is crucial for organisational success. Neglecting strategic thinking can lead to missed opportunities, lack of innovation, and long-term decline. In this guide, we'll explore how to strike the right balance between operational and strategic considerations.

With my best wishes,

Catherine

Need a sounding board to stay on track with your objectives? Call or email me

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The Delicate Balance

Operational and strategic issues are intertwined. While operational tasks ensure day-to-day functionality, strategic planning shapes an organisation's long-term vision. Here are some key points to consider:

1. **Awareness Matters:** Understand why you're dealing with operational issues. Sometimes, addressing immediate problems can inform strategic planning by revealing underlying challenges.
2. **Impact-Driven Culture:** In impact-focused environments (such as charities), operational solutions yield tangible results. Trustees/Boards may expect swift action to benefit beneficiaries and colleagues.
3. **Operational Grounding:** Viewing operational problems as opportunities can enhance strategic planning. Identifying recurring system failures, training gaps, or communication issues informs long-term efficiency, for example.
4. **Trustee/Board Perspectives:** Trustees may perceive risks differently. While addressing known problems provides reassurance, it can hinder growth. Reflect on the nature of each issue and consider long-term solutions. Share your thought process with your Trustees and your team.
5. **Empowering Others:** If people rely on you for solutions, encourage their personal growth and self-sufficiency. Enable them to find answers independently.
6. **Strategic Obstacles:** When defining a clear strategy becomes challenging, avoid reverting solely to operational fire-fighting. Invite allies — a funder to share their future investment priorities or another successful CEO — to your team and Trustee meetings.

Balancing operational efficiency with strategic foresight ensures an organisation's sustained growth. By addressing immediate needs while keeping an eye on the future, you'll create a resilient and forward-thinking environment.

Self coaching questions:

What are my long-term goals and vision?

How do my current activities support my strategic goals?

How do I keep track of progress and measure my performance?

Have I got the right balance of qualitative and quantitative metrics?

What resources do I have to invest?

Where can I be more efficient/focussed in order to achieve my strategic goals?

What mindset do I adopt? For example, Do I focus on the tasks that are easier and avoid getting out of my comfort zone?

What are my training or personal development needs?

Whose feedback do I get to ensure I stay on track with operational and strategic goals?

What have I learnt from past mistakes?