

Establishing a Plan

By JAKE RYAN

Assistant Superintendent, Northland Country Club



Yogi Berra is famed for his verbal bloopers and nonsensical logic. "I knew I was going to take the wrong train," he remarked one day, "so I left early." Illogical it may be, but there is something to be taken from it. Yogi did not spend time figuring out which train to get on, but had the extra time for the ill-prepared plan. Establishing a plan is common in the most ordinary activities of life. Whether driving your vehicle somewhere or finding the right train, we have a plan. Often times we don't realize it because it's so natural. What does this quote by the whimsical Yogi Berra have to do with establishing plans in business? It highlights the importance of planning for potential mistakes and looking at the big picture.

Inevitably mistakes occur and preparedness is important in minimizing the effects. If Yogi's train had been delayed or canceled, he would have been prepared for that by leaving early. But assuming he needed to be somewhere at a certain time his "plan" didn't envision the "bigger picture." By seeing the big picture he would have figured out what train to take, made sure it was on time and ultimately

achieved his goal more efficiently.

In business, the big picture is the strategic plan of the company. A sound plan must be developed in order to achieve goals. Within goals there are many tasks that must be accomplished. A shortsighted plan can lead to many troubles.

Troubles can lead to hardship. Winston Churchill had a great perspective on this when he said, "Let our advance worrying become advance thinking and planning."

Yogi didn't need advanced thinking and planning to do his very ordinary task. The importance of advanced thinking and planning in a business is vital though. For us, in the golf course industry, planning is common as preparing the daily tasks. Even more important is the need to position our golf course to be more marketable, unique and desirable. To accomplish this, strategically planning two, five, ten years down the road is essential.

To gain insight on establishing plans I had the privilege to correspond with a couple of business people. Dr. James Balogh was kind enough to sit down with me for an interview. Mr. Joel Conner and I had email communications that were very insightful. The following are brief

profiles of the persons I had an opportunity to communicate with.

Dr. James Balogh,
Spectrum Research, Inc.

Dr. Balogh started his professional soil science company Spectrum Research Inc. in 1984. As the Chief Executive Officer and lead scientist he is responsible for day-to-day operations and overseeing strategic research planning. His company performs testing of soil and water, research contracting, environmental assessment and ISTS design/assessment. He currently oversees four large soil water quality research contracts, two turfgrass research contracts and multiple waste waster contracts.

Dr. Balogh has been a part of many research projects in the areas of turf, soil and water. In 1993 he completed a five-year, USGA contracted, research project on the environmental effects of golf course management on soil and water. That research effort led to the publication of his book *Golf Course Management and Construction: Environmental issues*. He earned a Bachelor of Art degree in Natural Sciences from St. John's in Collegeville, Minn. He has a Master's of Soil Chemistry and a Doctorate of Soil Science from the University of Minnesota. He was also part of the Research Teaching Team at The University of Maine for three years. Dr. Balogh is currently contracted by the USGA for a phosphorus and pesticide runoff study. It is the first water shed and soil water environmental project with long term monitoring in the country. This research is conducted at sites in Ohio, Texas (Morris Williams Municipal Golf Course) and Minnesota (Northland Country Club).

Joel Conner,
Bellisio Foods, Inc.

Mr. Conner has been involved with Bellisio Foods in a variety of positions

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since the inception of Michelina's. As Chairman and Chief Executive Officer, he is responsible for the day-to-day management of Bellisio Foods, Inc. and focuses on developing and overseeing its strategic growth objectives. He has been instrumental in leading the company's consumer marketing and international sales efforts as well as building sales in the alternative retail channel.

Mr. Conner has been involved in dozens of successful start-up and turn-around companies, public and private, and has served on the boards of directors or advisory boards of numerous organizations in banking, real estate, restaurant management, professional sports and manufacturing. He earned a Bachelor of Science degree from the Cornell University School of Hotel and Restaurant Administration in Ithaca, New York. He has a Doctor of Law-Honorabilia from Flagler College and has served as a lecturer and faculty assistant at the graduate and postgraduate level of five colleges and universities, including Cornell. Mr. Conner is also active on numerous civic

and non-profit organizations including: SIFE, Flagler College, and Children's Heartlink.

In order to develop successful plans, it is necessary to understand your organization's strategic vision and to incorporate that vision into future plans and day-to-day operations.

What steps do you take to establish your organization's strategic vision?

Jim: The strategic vision of his company is based on monitoring technical and scientific literature in attempt to predict what problems will be five years down the road. They must train and do initial research to take advantage of consulting and research when problems are well known. When the company identifies potential problems and those problems become apparent to the public his company can benefit from the situation. Regarding the establishment of his strategic vision he said, "People don't want to pay me for what I find interesting, only to solve their problems." This means he must always be ready and willing to adapt with environmental needs.

Joel: "We gathered a mix of our leaders from throughout the company and

worked together through a strategic planning process. We gathered data about the company's past success as well as opportunities on the horizon. Each participant received and turned in homework before our meeting which allowed our facilitator to identify trends in the data for the group to discuss in detail."

"We held an off-site retreat during which we identified goals for the next three years, and more refined objectives for the coming year. After the workshop, team leaders refined their one-year objectives and defined general success measures. That said, we did not go through the exhaustive process of coming up with metrics that are measured monthly because that's not our culture. Instead we are checking in on our progress in depth each quarter, focusing monthly on specific items of highest priority."

Sometimes the best-engineered strategic planning falls by the wayside because concrete action plans for accomplishing strategic goals are not developed. Or, some managers get lost in the day-to-day details and lose sight of the big picture, the strategic vision of the organization. Action plans are essential for the implementing and monitoring strategy.

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What suggestions do you have that can help develop effective strategic action plans?

Jim: At Spectrum Research Inc. they give a priority order by ranking the importance of goals. Goals having the greatest impact on achieving strategic goals should be your top two or three. Then they define the roles of the staff to achieve them. Jim feels developing these plans in his businesses "Involves how to sustain business in the future and revolves around marketing to have work in the future." Once research is contracted and goals are established the rest of the work is pre-determined activities. Research doesn't have the flexibility to change goals on monthly or quarterly basis.

Joel: "Two simple suggestions: 1 - When establishing the goals, identify deliverables, a lead person and the timing of the projects necessary to succeed. 2 - Meet quarterly to review progress across all the top strategic efforts."

The best way to develop long-range planning skills is to actually create long-

range plans.

What are some of your processes for constructing these plans?

Jim: "Sit down and put plans to paper once a year. Revisit them once during the year. The next year see if there are failures and make changes. Always write this down." His planning involves goals, deadlines, tasks and subtasks, budget, required resources, constraints and implementation. Economic climate can change these plans. For example, the real estate market is down. Without homes being built the company's ISTS design/assessment sector goes down. Ultimately, they go back to the plans and adjust accordingly to increase cash flow.

Most business people acknowledge the importance of planning and goal setting. Sometimes, however, time pressures get in the way. Setting aside time to identify and develop your business goals and strategies is the first step in improving our ability to plan and manage effectively.

How do you translate your developed business strategies into clear objectives and tactics?

Joel: "After the strategic planning

workshop, team leaders for each goal/objective need to come up with a list of strategies and present them back to the whole group. This allows the experts in each area to gather their teams and discuss in detail what is necessary to succeed."

When you are implementing a new plan, project or system, it is necessary to make realistic estimates of required resources in order to achieve the desired goals efficiently. You can't expect others to carry out your directions successfully without adequate resources. Without timely access to resources of all types, delays will occur.

How do you ensure you have adequately assessed your resource needs?

Jim: Communicating your plans and objectives to all employees. Seek input on objectives and tactics that might affect them. Concerning research contracts he said, "Evaluate the project budgets and review what the employees are accomplishing to stay within it. If you are

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outside your budget, figure out why it happened and make changes." Use the ideas and utilize resources in a way that allows efficiency. To accomplish this don't compromise plans and objectives.

Joel: "At times of growth, like those we are in, assessing resource needs is challenging. We simply talk through the plans as we understand them and apply resources accordingly. It's important to note the words "apply"; it's not about adding in many cases but instead resetting priorities and reallocating existing resources."

Unrealistic plans can create more problems than they solve. For example, an impossible schedule set by one depart-

ment may eventually affect the schedules of many other departments, causing inefficient use of resources, late introduction to the marketplace of an advertised product, and a general sense that things are out of order.

What techniques do you use for evaluating project plans as a part of the planning process?

Jim: For finances, make spreadsheets for evaluation and confront it with all possible things that could go wrong. Timing aspects are very important but very difficult. In his profession Jim says, "What I do is dependent on the weather. I plan everything out three days in advance to make sure we accomplish our tasks." Adapting to the weather tends to be a "hind sight is 20/20" situation. You can try to predict but don't plan on it.

Keeping track of the overall picture is the best way to avoid overcommitting yourself.

Joel: "Our approach to prevent problems is addressed by adhering to two rules: Have the right people in the room. Expect clear, direct, honest communication from each participant during the meeting."

I would like to thank Dr. Balogh and Mr. Conner for their time and hope everyone has taken something from this article. If you have any ideas for future "Management Matters" articles please feel free to email me at jryan@northlandcountryclub.com.

* * * *

(Editor's Note: Joel Conner's profile was gathered from Bellisio Foods, Inc. website. Lead-ins and questions are developed from "Successful Manager's Handbook.")

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Contact: Tim O'Driscoll
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507/536-4487

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or Jeramie Gossman
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