Chapter 2
The Fall of Strategic Planning
Obscuring the Essence
THE FALL OF STRATEGIC PLANNING

OBSCURING THE ESSENCE

Changes that appear turbulent to organizations that rely heavily on planning may appear normal to, even welcomed by, those who prefer a more visionary or learning approach. Put more boldly, if you have no vision but only formal plans, then every unpredicted change in the environment makes you feel like the sky is falling.

—Henry Mintzberg

remember the old board game chutes and ladders? Players compete to get to the top of the game board. The way is marked with both hazards (chutes that make you slide backward) and helps (ladders that zoom you ahead). The simple strategy is to avoid all the chutes and try to land on the ladders. One time, I was playing with some young children who didn’t really know the object of the game. Because of their fascination with sliding on the playground, they thought it was just as much fun to slide down the chute on the board game as it was to climb up the ladder!

The image of sliding backward, unaware of the demise, is a fitting one for church leaders who pursue strategic planning. While attempting to step ahead and bring the church to a new level of effectiveness, they are really slipping backward and making it harder to win. The strategic plan may actually obscure the concept of Church Unique and fail to guide the church to a better future.
A pastor friend once told me that the fastest way to get out of a hole is to stop digging. Ironically, there are times when the tools we work with are so mismatched to our current challenges that we only exacerbate the problems we are trying to solve. In such a case, we must abandon the wrong tools in order to pick up the right ones. For those of you who resolve to discover your Church Unique, this chapter is written to warn you that strategic planning is no longer the preferred tool for leading the church into the future. For many pastors and well-meaning layleaders, it’s time to put down the shovel.

Falling down the Chute

The practice of strategic planning developed in the 1960s and was used broadly by organizational leaders through the 1970s and 1980s. Strategic planning is the process of determining the overall direction of the organization and then “breaking down” that broader direction into objectives that are then divided into smaller, more measurable action steps or goals. Though the practice has continued in the last two decades, the “returns” from engaging the planning process have been elusive.

Application of strategic planning, despite its limitations, remains prevalent in the leadership practices of thousands of churches across the country. These churches spend many dollars and hours on strategic planning, with marginal results. Despite plentiful criticism from worn-out laypeople and disillusioned church staff, little or nothing has been written to the church audience to address the problem. Furthermore, there is little support for pastors to combat insistence on a strategic plan from well-meaning elders and deacons—especially the corporate gladiators of the 1960s, 1970s, and 1980s. Unfortunately, for a church with a few decades of history an entire generation of retired businesspeople keeps the application of this planning method alive and well in the leadership ranks of our churches.

Case Study A: “Losing Ground”

To illustrate the problem of strategic planning, I will use the words of a well-meaning layleader. In the wake of a twelve-month strategic planning process, this leader put together the “status of the church” report. Here is the last paragraph of his report:

What are the implications of this study? On the surface [the church] appears to be a vibrant, committed, giving, mission-minded church on an excellent, well kept and adequate campus. The calendar and schedule are full, there is an excellent hard working staff backed by
managerial and support staff. There are plenty of educational, worship, and mission opportunities, and giving to the church has remained high and consistent. The attendance numbers and the near static growth in membership present, however, an unanswered question. Why with the staff, programs, giving, and opportunities has the church tended to lose ground rather than gain ground and what can and should be done about it? [italics mine]

Can you hear the frustration in this man’s report? Everything seems to be in place and everyone is plenty busy. Despite a huge investment of time and money, including the work of an outside consultant, the strategic planning process has left them “losing ground.” The most thoughtful leaders are still standing around scratching their heads.

Case Study B: “What Do We Do Next?”

I have been in conversation with a historically strong church in one of our country’s banner evangelical cities. The church recently completed an eighteen-month strategic planning process that produced a Ministry Master Plan. Why, after completing this process, were they calling on Auxano as group of vision navigators? Simply put, they didn’t know what to do. That is, they did not know how the contents of a strategic planning document should intersect with the realities of existing church life. How is this possible? The answer becomes clear as we unpack the fallacies of strategic planning. Before doing so, let’s scan the contents of the Ministry Master Plan itself. The resulting document contains:

- A “purpose statement,” “mission statement,” and “vision statement,” each between forty and seventy words
- An eight-point bullet list of “ministry characteristics,” each bullet containing long descriptive phrases
- A six-point “core values” list, each with a sentence of description
- A ten-point “passions” list with paragraph explanations and biblical justification
- Three sets of “strategic objectives,” including “overarching objectives,” “targeted objectives,” and “supporting objectives”
- Five overarching objectives containing twenty action steps
- Three targeted objectives containing thirteen action steps
- Three supporting objectives containing nine action steps
- Ten pages with the content organized around eighty-four pieces of content
The report is certainly a testimony to a lot of time from a lot of people. But what are we to make of this complex document? Why, with all of this information, are leaders wondering what to do next? Despite the thoughtfulness of this strategic planning document, it neither inspires people to become a Church Unique nor provides practical, daily guidance for leaders. Why? Let’s start by examining two very different approaches for any vision or planning document. The approaches can be defined by a subtle change in emphasis: Are we talking about the organization to people, or talking to people about the organization?

First, are we talking about the organization to the people? The ministry plan with ten pages and eighty-four pieces of content emphasizes explanation and justification of all the activity in the organization. The volume, complexity, and structure of the report are overwhelming to most ministry professionals, not to mention volunteers. To state the limitation of the classic strategic plan in one sentence, it misses the human element. Remember those large, multifold travel maps? I travel a lot and enjoy being with churches across the country. But if I had to pull out one of those cumbersome, old-school maps every time I jumped into my Hertz, I would go insane. Which side is up? What part of the map do I look at? Which ramp do I take? The map would probably end up in the back seat—never to be unfolded again.

An alternate approach asks, Are we talking to people about the organization? The priority here is not the plan itself but the church leader, volunteer, or attender for whom the report is actually intended. In this case, the document leans toward simplicity in order to bring clarity. Using the map analogy again, this is like getting directions from Mapquest. I enter my starting point and my destination and get step-by-step driving directions with a highlighted map showing me exactly where to go. Simple, clear, and easy to understand. Undoubtedly, both kinds of map may be accurate, but only one gives me clear and specific guidance as to how to get to my destination without an overload of data.

These two case studies represent thousands of stories from similar vision teams and long-range planning committees in churches across our land.

Three Fallacies

As we continue to recast vision, I want to take a moment to debunk strategic planning. I do this only to inspire better visioning. To be clear, though I’m offering a strong critique of strategic planning, I am in no way discouraging the process of “future thinking” or planning in general. I’m asking leaders to reconsider how they execute and express their
planning work. To do so, we will explore three key fallacies of classic strategic planning. Keep in mind that the remedy for these fallacies is given in Part Two and Part Three.

**Fallacy One: The Vision Shredder**

Have you ever put the wrong document in a paper shredder? There’s no way to get it back. You just can’t put the strips back together; no amount of time and tape will fix it. A similar thing happens to vision when you develop a strategic plan. The assumption is that more information will produce clearer direction, but just the opposite is true. I call this the “fallacy of complexity.” Too much information shreds the big picture into so many small pieces that the vision is hopelessly lost. More information equals less clarity.

We live in an information revolution. This revolution pushes the limits of our humanity by delivering an ocean’s worth of information to us daily—giving us “knowledge fatigue.” Imagine our world: knowledge doubles every year, more than one million Websites are created each day, and some 65 percent of preschoolers today will work in jobs that don’t yet exist. The bottom line is that people do not need more information; they need more meaning from the right information. Leaders of today must learn how to deliver meaning by distilling what they say.

To illustrate this point, consider an historic event designed to memorialize the soldiers who lost their lives in the American Revolutionary War. The year of the memorial was 1863, and the event planner secured one of the greatest orators of the day to be the keynote speaker. His name was Edward Everett. That day, Everett spoke for two hours and delivered an address that consisted of 13,607 words. The president, Abraham Lincoln also spoke that day. He got on and off the platform so fast that the photographer didn’t have time to take his picture. The Gettysburg Address was 286 words in length. This perfect distillation and articulation hit the bull’s-eye of the nation’s heart. Today his words still echo in the lives of millions of Americans. Fewer words had further reach.

**NO IDEA ABOUT THE BIG IDEA.** To state the fallacy of complexity more academically, we would say that analysis does not lead to synthesis. In other words, the ability to break the whole into parts does not inherently help us keep the whole in mind. For example, a mayor thinks and communicates synthetically motivating city residents to raise money for a new bridge. But an engineer thinks and communicates analytically in order to make the bridge a reality. Both types of thinking—analysis and
synthesis—are essential, but they have completely different functions. Analysis breaks the whole into parts (how many steps are required to build the bridge?). Synthesis builds the parts into a whole (why should a bridge exist in the first place?). The fallacy of complexity erroneously assumes that if we deal with the details long enough, the big idea will continue to emerge. This would be like the mayor trying to generate enthusiasm for bridge construction by showing math formulas for bridge design. Inevitably, enthusiasm dies as the city folk are buried by irrelevant and boring information. Likewise, in most church settings the details of the strategic plan eclipse the big idea or the all-encompassing vision that people have not yet captured.

FROM FOX TO HEDGEHOG. One might push back in objection, to say that a good strategic plan synthesizes and clarifies the mission or vision of the organization as a singular idea. Even though this is theoretically true, in reality it never happens. Two things muddy the waters of clarity in almost every strategic plan. First, too much information obscures the big idea that may in fact be there. Second, there may be several competing, mutually exclusive big ideas. In either case, the secret is learning to say more by saying less. Andy Stanley writes: “Too much information may, in fact, have a canceling effect—that is, multiple ideas or concepts can actually compete with each other for the listeners’ attention and retention . . . and with every additional thought you introduce, you diminish the effectiveness of the prior ideas you may have presented.” In fact, research conducted by an advertising firm has shown that “when ever there were at least four different fifteen-second commercials in a two-and-a-half minute commercial time-out, the effectiveness of any one fifteen-second ad sinks to almost zero.”

In our Case Study B cited earlier, there are actually three competing statements: a mission statement, a vision statement, and a purpose statement. Only one of these statements is necessary, and if it is stated well it will need fifteen to twenty-five words, not forty to seventy. By having all three of these terribly long, redundant statements, we severely diminish the opportunity for anyone to carry and communicate the vision contagiously.

Jim Collins’s use of “the fox and the hedgehog” fable from an ancient Greek poet illustrates the fallacy of complexity. The poet Archilochus wrote, “The fox knows many things, but the hedgehog knows one big thing.” In Good to Great, Collins demonstrates that great organizations live and breathe from a hedgehog concept. They are ruthlessly clear about the one thing at which they can be the best in the world. Organizations
that act like foxes, chasing after too much too often, never achieve a
singular focus. They stay stuck being “good.”

Fallacy Two: The Silo Builder

Church leaders know what organizational silos look like. What defines
success for staff members? The answer is, “Butts in seats in my ministry
area!” Many churches use “nickels and noses” as the only measure for
success. This primary measure of worship service attendance is translated
down into the ministry departments. The result is a golf-team mentality
where team success is measured by adding up individual scores at the end
of the day. Quiet competition simmers underneath the calm surface of
most staff meetings, with individual ministries trying to outdrive the
others.

When a strategic planning process is introduced into an environment
where real teamwork is already challenged, the plan itself becomes a silo
builder that reinforces the concrete walls between ministry areas. This is
the second fallacy of strategic planning, the “fallacy of accountability.”
As multiple goals are developed for each separate ministry area, the
expectation is that staff and volunteers will experience better coordina-
tion, with clearer responsibilities. The false assumption behind this prac-
tice is that more goals help people work better together. Exactly the
opposite is true. More goals typically create a more fragmented approach,
as each leader focuses solely on his or her responsibilities and outcomes.
In an effort to establish positive steps of accountability within ministry
areas, the church misses out on synergy among all ministry areas.

What the church really needs is a strategy that helps members function
more like a football team than a golf team. A football team shares one
score, which is based on coordination of highly diverse functions—there
may be forty-six individuals with forty-six performance indicators, but
there are not forty-six goals. The singular goal is to get the ball into the
end zone.

A strategic plan can easily divide a team by giving each player an indi-
vidual goalpost. How exactly does this happen? Let’s refer back to the
Ministry Master Plan briefly outlined earlier in this chapter. There were
three kinds of objectives, with a total of forty-two action steps or goals.
Here is why the plan inhibits synergy:

> Too many goals threaten to make any one goal unclear. Would we
  rather have forty-two goals that no one remembers or one goal that
  forms the ever-present gauge on your “dashboard of ministry”?

The Fall of Strategic Planning
Too many goals weaken the connection between the goals and the larger vision. Do we want workers who are excited about the big picture as they do their daily “bite-sized” tasks? Imagine your volunteers as brick makers. Do you want every brick maker focused on bricks-per-hour efficiency, or brick yield loss, or brick compression strength, or mortar viscosity, and so on, at the risk of not envisioning the beautiful cathedral he is building?

Too many goals make it harder for people to have shared goals. How can our leaders all point in the same direction on cue, as we navigate ministry together (like the choreography of a school of fish darting through the water)? How do our goals inadvertently create competition for the same limited resources?

Too many goals inhibit good decision making on the front line of ministry. Do we have a lot of goals because we are trying to compensate for lack of trust and communication? Are we releasing competent people on the front line of ministry, or are we dictating decisions from the boardroom?

Time and time again, I see more goals equaling more confusion. Well-intentioned pastors and planners think they are building a ladder to greater achievement. What they really are building is a chute that flushes synergy down the drain.

Fallacy Three: Leadership Blinders

It has been said that all leaders live under the same sky, but not all view the same horizon. Some leaders see a wider horizon and keep their eye on the emerging skyline. Continual learning contributes to their sense of adventure and their ability to steer their organization. Others, however, unknowingly wear blinders. The shifting horizons don’t signal new opportunities because they are unanticipated and out of view.

The third limitation of strategic planning is how it keeps blinders on leadership. I call it the “fallacy of predictability.” The assumption is that the near future will resemble the recent past. But rapid cultural change has meddled with this assumption. Change now happens so fast that the planning processes of yesteryear are obsolete. Unfortunately, not even the future is what it used to be. Innovation expert Jim Carroll paints a compelling picture:

Clearly you need different skills to take you into a future that is becoming far more complex, challenging and different by the minute. How can you keep operating the way you do—with the same culture,
structure, rules and methodologies, when the rate of change that envelopes your organization is so dramatic and so darned fast? We live in an era of unprecedented and relentless change. The emergence of China as a super-power; hyper-innovation and business market turmoil; constant career change and rapid scientific advances. Competition is changing overnight, and product lifecycles often last for just a few months. Permanence has been torn asunder. We are in a time that demands a new agility and flexibility: and everyone must have the skill and insight to prepare for a future that is rushing at them faster than ever before.  

Despite the realities of relentless change, the strategic planning process in churches still presents five-, ten-, and even twenty-year plans. How ludicrous! With permanence “torn asunder,” we can’t extrapolate the present reality as we used too. The ten-year plan becomes an exercise in fantasy, not vision.

Planning assumes predictability in much the same way that a hiker counts on a map to navigate. There are fixed points in the future that can be anticipated, because the mountain pathways and earth-shaped landmarks stay relatively fixed over time. Their presence is predictable. But imagine the scenario of a sailor on the open water. There are few geographic landmarks, and no landmass to provide an ever-present constant. In fact, shifting winds, changing currents, and impending squalls require an entirely new set of skills and tools. Navigating a liquid surface necessitates ceaseless observation and adaptation to the surrounding environment. How should we begin to adapt our perspective on planning in today’s environment? Reggie McNeal offers a guiding light. Leaders must focus more on preparation than on planning. Planning relies on predictability. But preparation helps leaders stay clear amid uncertainty. Planning assumes continuity; preparation equips leaders to be flexible enough to seize opportunity. It forces them to pray, learn, and discern what God is doing—all aspects of understanding God’s unique vision for the church. After all, isn’t it God who does the planning (Jer. 29:11)?

Is your church’s relationship to the future arthritic or adaptive? If you are engaged in a strategic planning process, be cautioned. It might be forcing leaders to wear blinders to the changing world around them. It might also be strengthening unhealthy silos that rob the church of precious energy every day. Finally, it might be running your vision through someone’s mental paper shredder, never to be recovered again.

Consider reviewing Table 2.1 with your team. What fruits have planning processes yielded for you in the past? On the basis of your previous experience, which fallacies have affected you the most? Which have affected your church the most?
Table 2.1. Strategic Planning Fallacies Summary

<table>
<thead>
<tr>
<th>The Fallacy of:</th>
<th>The Wrong Assumption</th>
<th>The Strategic Plan Backfires as a:</th>
<th>The Real Need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complexity</td>
<td>More information will provide clearer direction</td>
<td>Vision shredder</td>
<td>Clarity</td>
</tr>
<tr>
<td>Accountability</td>
<td>More goals will help us work better together</td>
<td>Silo builder</td>
<td>Synergy</td>
</tr>
<tr>
<td>Predictability</td>
<td>The near future will resemble the recent past</td>
<td>Leadership blinder</td>
<td>Adaptability</td>
</tr>
</tbody>
</table>
Discover the meaning of this little equation:

1 + 2 + 4 + 16 = ∞

one whiteboard drawing
defined by
two vision decisions
reveals
four paths to the future
that provide
sixteen super-questions
for
limitless ministry innovation

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