

Strategic Planning Work System Improvement Tips

By [Kevin McManus](#), Chief Excellence Officer and Systems Guy, [Great Systems](#)

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Does your strategy and planning work system generate great idea flow rates?

Do you have pollution in your idea pool? Most organizations have a backlog of improvements they want to develop and implement. Most managers cringe when someone suggests that we hold a meeting to collect ideas from 'everyone in the workplace.'


Too many managers and supervisors lack effective project management skills. Even fewer can design and use effective approaches to develop strategies and plans. How effective is your strategy and planning work system?

The Planning Work System

Annual Planning Process:
Provide a comprehensive means of creating a road map for improvement


Decision Matrix:
Gives you a fact-based way to decide how key time and money resources will be used

Key Project Database:
Serves as the primary source for current and future improvement options



Cultural Challenge:
Failing to appreciate the resource limitations that hinder project throughput

Key Leverage Point:
Give each employee the time and skills to help implement projects



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Unfortunately, I continue to witness the above facts in all too many organizations. After years of learning and experimentation I know what types of system changes to make to reduce idea backlogs. Best practice mechanisms exist that allow all team members to contribute their ideas for improvement.

Two or more years of work in an instance

I, like most facilitators, can go into any company, meet for an hour with a collection of their employees, and identify at least two, or three, years of project work for someone. It is for this reason that I strongly dislike suggestion boxes as organizations typically use them.

The typical suggestion box collects ideas with weak descriptions from a small group of people. Worse yet, we don't use a sound project evaluation and development to keep the idea box empty. Pollution begins to accumulate in our idea pool.

Leaders raise expectations when people think things will change. These expectations are then dashed when the organization fails to put suggested improvements in place. In most cases, people fill the box with problems that they are most familiar with. Without knowledge, they may not suggest things that may benefit the overall goals of the site the most. They don't understand why changes aren't made. Management takes a big credibility hit.

It is truly a vicious cycle. People won't share ideas because management won't listen, and management won't listen because the people suggest things that really won't make that much difference. As morale drops, supervisors spend more time on complaints instead of project work that would help reduce the gripes.


Finally, someone calls the consultant to fix morale. He or she asks the people for their ideas about how to improve it. An additional dump into the already polluted pool is made. How much pollution exists in your idea pool?

How do you pick your projects?

Like it or not, every person, team, location, and organization has limits when it comes to project evaluation and implementation. There is only so much time and money to go around.

Despite these limits, organizations still waste time on 'squeaky wheel' or 'pet' projects. They fail to focus their precious time and money resources on those areas that would provide the greatest return on investment.

Top Planning Work System Weaknesses



The Clog

- Stakeholder involvement in planning is limited
- Resource needs are not projected effectively
- Improvement lists (action plans) are not linked together
- The amount of time available for project work is limited
- A formal prioritization process is not used
- Few people practice good project management skills
- Squeaky wheels get too much of the grease – opinion rules!
- Waste streams are largely unknown or ignored
- Project descriptions are not 'how' focused
- Weak metrics are used to assess planning process effectiveness

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"The first step on the road to high performance begins with a choice."

There are two ways to get more time for projects (other than hire more people). First, take waste out of jobs and use the time you save for project work. Second, improve how your people use their project management skills. Unfortunately, one needs system changes in the form of projects to reduce the waste. Reduce project development cycles via skill development and practice. Unfortunately, both take time.

The road to recovery first requires a recognition of what project time limits exist. Next, you must ensure that you focus those limited resources on the projects that provide the greatest 'bang for the buck.'

While this seems like common sense, far too many organizations don't use a formal tool to make decisions. They also tend to overestimate how many projects their people can complete in a set amount of time.

How do you plan to succeed?

Most companies plan on an annual basis. A group of people go offsite. They spend a day or two to list possible improvements and select their favorites from the list. Someone takes the pile of flip chart paper and creates a notebook that looks nice.

Then, leaders hand out the notebooks that are soon to join their peers on the office bookshelf. Tombstones of good intentions, ready to collect dust.

I admit that this perspective is a bit cynical. Some companies do a better job with plan development

Example Decision Matrix

2005 Possible Plant Projects - Decision Matrix

Indicate degree of impact (1 = low to 5 = high)

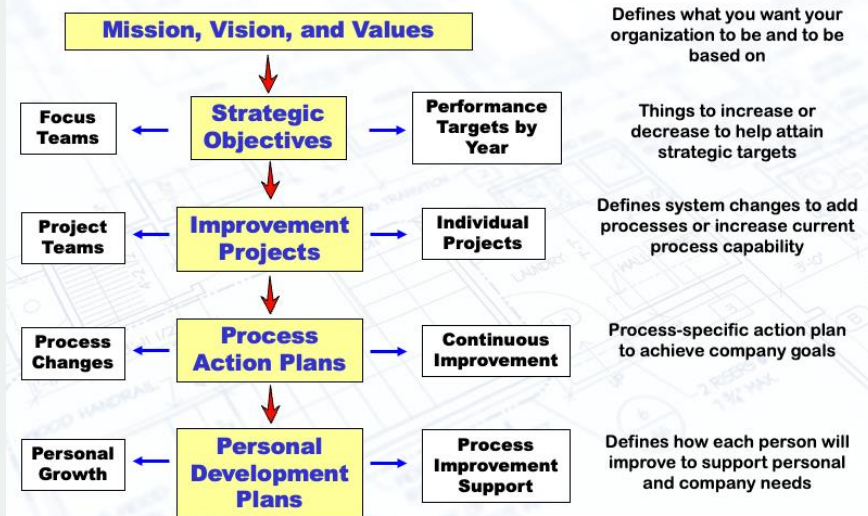
#	Objective Description	Personal Safety	Food Safety	Employee Satisfaction	Product Quality	Process Costs	Process Efficiency	Process Waste	Knowledge Levels	Total Points
1	Install bulk sugar handling and dispensing system	5	3	4	2	3	3	1	1	22
2	Purchase and install wet washing system for main bottling line	1	5	2	4	2	2	2	1	19
3	Send all leadership team members to an external training course	3	3	5	2	3	2	3	5	26
4	Purchase and install flow racking for high volume finished goods	5	2	3	3	2	3	2	1	21
5	Evaluate the feasibility of using automatic inspection equipment	1	3	2	5	2	2	3	2	20
6	Redesign packaging area and purchase palletizing equipment	4	2	3	3	4	3	2	1	22
7	Train all supervisors in the use of Excel spreadsheets	2	2	2	4	4	3	3	5	25
8	Rent and begin using outside storage facility for raw materials	1	5	2	2	2	2	2	1	17
9	Replace the existing rotary filler on Line #1	2	4	2	3	5	4	2	1	23
10	Purchase and install new maintenance scheduling software	3	3	1	2	3	4	2	2	20
11	Provide SPC training to all supervisors and lead people	1	2	2	5	3	2	3	3	21
12	Set up and begin using plant intranet for communication purposes	3	3	4	2	2	1	3	5	23
13	Purchase new uniforms for all operation employees	2	4	5	1	1	2	1	1	17
14	Replace the two oldest electric forklifts	4	3	5	2	2	3	1	1	21



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Fitting It All Together



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than this. You must judge for yourself how effectively your own organization plans. Where do their efforts lie on the spectrum between dust collector creation and innovative system change implementation?

One key lies in the fact that the better sites use formal processes to create their plans, review plan progress on at least a quarterly basis, and make efforts to improve this process each year.

[EXPLORE MORE: Find more resources at the Greatsystems website!](#)

Steps for a better strategy and planning work system

I was lucky. I was able to spend five years with a company that did planning very well. They involved the entire workforce, and they focused their limited resources on those areas that needed them the most. They kept everyone informed about plan progress monthly, and they improved the process from year to year. Was everyone always happy? No, but in general, they were a lot more satisfied than other workforces I have seen.

You might notice that I speak more of annual planning versus strategic planning here. Well, that is intentional. Strategic plans are both nice and necessary, but one needs effective annual plans if you ever want to make those multi-year strategic plans come to life. Otherwise, you will end up with lists of what you want to do, and you will wonder what to do next to reduce the backlog.

To create effective strategy and plans, you must use your time and money resources wisely. The gap between your key results measures and their goals should tell you where you need to improve performance. Employee input and root cause analysis should help provide you with the answers to the ‘how do we make the numbers better?’ question.

Use a formal tool to systematically make decisions that consider each project's potential resource impact. Such a tool will help you pick those improvements that will make the most difference.

[BUY my “Pursuing Process Excellence” workbook NOW at Amazon.com](#)

Would you like to improve your strategy and planning work system?

For over 40 years, I have helped design and install strategic planning work systems in many different companies - both small and large - in the manufacturing and service arenas.

This experience has helped me discover value added, simple ways to set up an effective planning system. Such a system can help you make simple systems improvements that will significantly increase your idea flow rate.

Creating a Better Planning Work System



Here are eleven ways to create a better planning work system:

- Use a central database for all current and potential projects
- Use a well-designed form to properly capture and share all possible ideas
- Provide a means for all employees to contribute to the idea pool
- Budget more time for project development into every job
- Use a decision matrix to prioritize and select projects
- Create an annual operating plan for each site in your organization
- Employ the use of a simple, but focused, annual planning process
- Add a % complete column to all of your project progress action plans
- Teach a simple project management process to most of your people
- Identify and recognize your innovation threshold – your project hour limit
- Teach all employees about the time and money resource limits that exist

Lack of time for projects and poor project management skills result in a poor idea flow rate - the primary power restrictor for this power system. The planning tools I share can help you both eliminate that barrier and move forward more rapidly towards higher levels of performance.

Keep improving!

About the author

As Chief Excellence Officer of Great Systems LLC, Kevin McManus provides virtual coaching and content to help people use proven best practices to enhance and optimize their daily work systems.

Over forty years of work experience in roles such as Industrial Engineer, Training Manager, Production Manager, Plant Manager, and Director of Quality give Kevin a 'real life work' perspective relative to daily work process optimization, work team engagement and empowerment, and sustainable operational excellence.



As a contract trainer for the TapRoot® root cause analysis process, Kevin has taught over 450 courses and further enhanced his ability to help leaders proactively minimize risk, reduce errors, and improve reliability. Kevin holds an undergraduate degree in Industrial Engineering and an MBA. He served as a national Malcolm Baldrige Performance Excellence Award Examiner for twenty years, including a three-year term on the national Judge's Panel.

Kevin has authored the monthly performance improvement column for Industrial and Systems Engineer magazine for over 20 years, is an Institute of Industrial and Systems Engineering Fellow and has been a member of IISE for over forty years. His newest book, "NextGen Leader Standard Work – the Key to Operational Excellence", will be published in late 2025.

If you would like more information about the improvement tools and systems I have to offer, please send me an e-mail at kevin@greatsystems.com.

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"The first step on the road to high performance begins with a choice."

Kevin McManus, Great Systems!



Great Continuous Improvement Books by Kevin McManus!



Pursuing Process Excellence

- 150 pages of ideas and examples that will help you accelerate and sustain your process improvement efforts
- Over 25 examples of 'best practice' assessment tools that leaders can use to encourage and support high performance work
- 12 team exercises that you can use to begin applying each concept as it is learned



Mistake Proofing and Corrective Action Writing

- 156 pages of exercises, tools, and examples to help you learn about and practice the fundamentals of mistake proofing and corrective action writing
- 14 exercises you can use to practice the five key mistake proofing tactics and identify tasks and processes to target for improvement
- Over 100 proven techniques to help minimize the risk and error potential associated with daily job completion



Error Proof

- 162 pages of examples, strategies and dialogue questions to help you stop daily goofs for good
- Over 100 proven best practices that you can use to help error proof your key work processes
- Can be paired with the 100-page workshop workbook that contains 13 team exercises to help you begin applying key ideas



Facilitating and Leading Teams

- 182 pages of ideas, tools, and examples to help you improve work team, project team, and focus team effectiveness
- 10 assessments that will help you identify areas of strength and weakness relative to work and project team support
- Over 20 team exercises that will help you optimize your use of teams and improve meeting effectiveness, while also practicing your facilitation skills



Lean Tool Use Basics

- 150 pages of exercises, tools, and examples to help you learn about and practice the fundamentals of lean thinking
- 13 exercises you can practice to learn more about using the five key lean tools, creating a lean culture, and planning for lean success
- Two assessments to help you gauge the degree of support your lean efforts require and how much progress you make

kevin@greatsystems.com
206.226.8913

greatsystems.com

