

# It pays to look outside...



**When Accountants and Business Advisors, James Cowper decided to develop a strategic plan for their business, they didn't simply use their own in-house personnel. They decided external facilitators JFP Strategic Planning, would be far more appropriate.**

## **Adrian Rann, Chairman of James Cowper explains:**

### **Management and Structure**

"Because we undertake strategic planning for our clients, we knew what could or should come out of a planning day but we were certain we would get better results if we got someone independent to facilitate the activity for us.

At the time, the company was 16 partners strong and when you are running a strategic planning exercise with so many people, it's important that there is someone there to manage it properly, with a proper structure.

It was also a 2-day event, so not only is there a lot of information to record, but there is also a certain level of dynamism and crowd control that is needed, in order that everyone is heard."

### **Being open and honest**

"A strategic plan needs to look at both people's business objectives and their personal ones. I believe you need someone remote from the organization to get people to truly express their personal objectives. It's about getting people involved and asking everyone to be honest in conversation. We employed JFP as a catalyst to get our employee's views out into the open.

It's also about asking the questions in a different way, whilst often asking the obvious. This generally gets ignored

when you already know someone or have expectations of what the answer will be.

An external person will always help you look at yourself and your business properly. It gives you the ability to look inwards."

### **Formalising a plan**

"When a company such as ours employs someone like JFP there's a great sense of 'It's not the blind leading the blind'. You all have an understanding of what you are trying to achieve but it's the formalising of the process and the structure and framework of the planning exercise, that's very important.

JFP helped us collate our objectives into our strategic plan and agree appropriate timescales. It was the independent minute recorder of things we knew we should do but following a structured process that meant we covered every element."

### **Planning for the future**

"I'm not sure the activity changed our overall plan for the business, but it did allow us to focus on exactly what we wanted to do and that's what adds value. It started us on a journey that has now been going for 6 years and we are constantly changing and revising our plan. I think the most major exercise we

undertook as a result of our planning exercise was to reflect on our management culture, reviewing all of our values. This then led to a full brand review the following year. It also made us concentrate on the services we were going to offer and understand the strengths and weaknesses of the business."

### **It's important for any business**

"We are always telling our clients that senior management never spends enough time sitting back and looking at what they should do. Everybody has to plan and EVERY business should have a plan in order to achieve its objectives. Everyone within the business should know what these objectives are too. A plan also needs to be flexible, whilst you also need to allow yourselves time for effective strategy.

I think people who are the most resistant to strategic planning are those that think they have been doing OK. The truth is they could probably do an awful lot better!"