

Tactical Management: Getting Where You Want to Go

By Richard A. Reda and Jean B. Lenderking

Taking a deeper look at the second step in making decisions that address immediate needs while keeping a longer term goal in focus.

After initial drafts of mission and vision statements have been prepared and the first cut of a strategic plan has been developed, it's time to map out the move towards the future state. Keeping the longer term goals in mind, managers need to also be cognizant of short term needs.

- **Look** for opportunities to redefine jobs or functions, combining near term needs with longer term goals.
- **Establish** interim or transitional functions that bridge the gap between the two.
- **Capitalize** on the skills of employees who adapt well to change, to have them serve as mentors or guides to others during the transitional period.
- **Create** specific opportunities to transition from lesser needed functions to newer needs and roles, and celebrate interim successes.
- **Promote** buy-in by including your management team in making resource decisions that facilitate transition.

Make Resource Request Decisions that Are Integrated and Interdependent

Making sound decisions on resource requests and allocations can't be done in a vacuum. Look at how each of these is integrated and interdependent. When budgets tighten, training dollars

are often the first thing to get cut, especially when staff losses can't be filled. However, this is a time when training dollars are even more necessary. When employees are expected to make up for staff shortages, they often take on tasks and responsibilities for which they haven't been prepared or trained.

Don't limit training to the formal class room kind, though. Some needs can be addressed through mentoring, in-house training, developmental assignments and short term project oriented teams. Similarly, if you're able to supplement your work force with contractor or other external services, this has to be included in the mix.

Consider Delegating Some Functions to Customers

Another element to consider is functions that can be delegated or passed on to customers. If that seems implausible, just look at the transition to self-serve gas stations. Many other businesses have managed to cut costs by transferring some responsibilities to their customers. Examples include on-line airline ticket processing and automated/self serve check-ins; self serve check outs at grocery stores; and self administered medication in hospitals.

Is there a clear understanding within your organization and with your customers, about which functions currently performed are really essential, which ones are mandated by

Tactical Management

This is the third in a series of articles that describe the concept of **Tactical Management**, and the six milestones that enable managers to focus on long term goals while addressing short term demands. This article looks at getting where you want to go.

Previous articles can be downloaded from PDFs of the January/February 2004 and March/April 2004 editions of *Managing the Skies* located at www.faama.org.

law or regulation, which ones can be done by someone else, and which ones are obsolete or add little or no value?

In planning for the future, a regular program of self-analysis will help keep the organization streamlined and focused on its true mission. Start by taking a close look at your internal processes and deliverables. How can these be modified, "re-engineered" or deleted?

Include the Transitional Process in Your Strategic Plan

Whether you've done a traditional gap analysis, or used an appreciative inquiry approach to constructively build on successes, your strategic plan needs to also incorporate two goals that are usually overlooked in plan development.

Keep in mind, though, that transition is often fluid and far from mechanical. Expect the unexpected. Expect delays and obstacles. The purpose of the milestones is to serve as guides, not rigid requirements. If you're off course, fix the problem rather than fixing blame.

The first is the steps related to the move itself from present state, through transition to desired state. There is a tendency to direct resources at future state goals alone and to forget the transitional process. This bridge period focusing on near-term needs and objectives is as critical to success as any other step.

Most traditional planning also is often task oriented. There is nothing wrong with that. It's just incomplete. Part of the plan should address building and maintaining effective relationships within the organization and with customers, as well. That leads to the second goal: communication.

Communication Involves All Stakeholders

Communication—an area often overstated, and yet frequently under-addressed—involves *all* the stakeholders. An effective communications strategy is key to the success of your overall strategic plan, especially during a transition period. This is not limited to communication to subordinates, but should also address communications strategies horizontally as well as vertically and outside the organization as well as inside.

It's not enough to include in a plan that there will be communication. It has to happen, it has to be measured and it has to be two-way. Managers need feedback from employees, customers and each other to ensure that messages are being received—and understood—and that they're on the right track.

It also helps to let customers know that changes are happening as well as why and what the planned outcomes are.

Time spent on up front communications will pay off by avoiding or minimizing time needed to dispel rumors and rebuild relationships with irate and/or apprehensive employees and customers.

Your plan should also include regular measurements. Anyone who has flown knows that your plane and pilot are handed off from one air traffic controller to another. This is not just so that everyone knows where the plane is, but also to make necessary course corrections along the way.

Being only one degree off on a flight from New York to Los Angeles can have disastrous implications. Your plan must have milestones with clearly stated interim expectations. Keep in mind, though, that transition is often fluid and far from mechanical. Expect the unexpected. Expect delays and obstacles. The purpose of the milestones is to serve as guides, not rigid requirements. If you're off course, fix the problem rather than fixing blame. ✈

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