



**THE WAR ROOM**  
**Planning Center Process**

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# The Planning Center Process®

Strategic Insight's Planning Center Process is a unique management tool to generate, communicate and structure strategies, plans, presentations, studies and other problem solutions which require integrating a broad cross-section of people to support decision making and build consensus. When properly implemented, a Planning Center like a War Room stimulates creativity, synthesizes data into useful information and fosters team spirit to solve complex problems. The Planning Center Process is an excellent tool for creating ownership of a plan within an organization because it allows stakeholders to influence the planning process while it is occurring, rather than after the fact.

The use of a Planning Center is made necessary by *uncertainty, complexity, pressure, and deadlines*. When people and leaders become totally inundated with day-to-day crises – especially during periods of great change – they sometimes believe that they do not have the time to plan. They feel they cannot afford to take their key people out of day-to-day activities to go "off-site" to conduct insulated, intellectually pure planning. At the same time, they feel they do not have control over their projects' destiny. Such projects are often so difficult, one person can not get his "arms around" them. The Planning Center Process is designed to cope with this very environment.

The basic attributes of a War Room are not new. Successful endeavors and good leaders have employed them for all of recorded history sometimes with less than a full understanding of why they work. Strategic Insight has sought to codify these attributes so they can be used in a coherent, controlled – but creative – setting.

## Basic Goals and Objectives

The fundamental goal of a War Room is to help people get organized even when they don't know where they are going. It does this at three levels:

First, it is a place which geographically and physically organizes people. As such, it is sometimes confused with management information and data collection centers. While it has some of their characteristics, a War Room is markedly different than either of these.

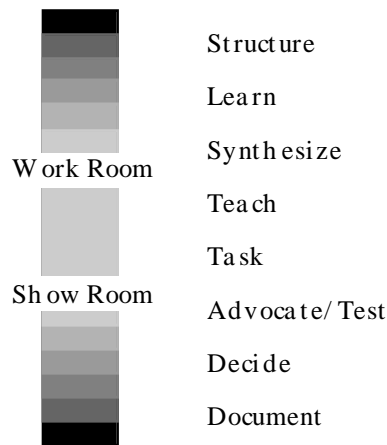
Second, it is a disciplined process for attacking a complex problem. The objectives of this process are to (1) identify the problem to be solved, (2) generate an approach to the problem, (3) physically display that approach and (4) collectively brainstorm with all concerned to develop executable solutions. The process works best when performed in a collegial manner where each participant has the opportunity to contribute to the effort.

The highest level of a War Room is where a story is told and an army of story tellers are created. Stories organize people – they affect the way people identify

themselves, collect data, and most important, how they behave. The key methodologies used in War Rooms are storyboarding and storytelling. We recognize that planning and problem solving require good stories and that good stories must connect both general and expert story lines. Organizations, like authors, must first set-up, understand, bound and properly present their “central problems” before problem solving and the planning quest can begin. The visual display technique called storyboarding is used to accomplish this and later enable collegial storytelling. This technique exploits the maxim that a picture is worth a thousand words, or, as Aristotle said, the "soul never dreams without a picture." Thus, pictures, graphics and other dramatic techniques for the sake of the story are crucial to successful storyboarding and storytelling.

### Phases of a War Room

Mature War Rooms evolve from the actions of eight overlapping phases: *Structure, Learn, Synthesize, Teach, Task, Advocate/Test, Decide* and *Document*. These phases are highly interrelated and repetitive. It is not unusual for two or more to occur simultaneously, requiring an adaptive and well-rounded staff to control the process. As depicted below, the phases can be grouped into a continuum, in which a “Bare Room” becomes a "Work Room" and evolves into a "Show Room."



*Structure* - Deciding how to tell the story is a search for a *structure* to bound the “right problem” and select appropriate solutions. So, during this first phase, the War Room staff should seek to establish a common framework for future planning and action. Decisions must be made to identify key chapters, main characters and critical story elements, including how and when to fit these parts into the story to achieve the best impact. Deciding when to stop a chapter and move to the next one is a primary challenge; and, it is often the critical choice for both effective argument and communication with the different groups or professions involved.

It is a fact that great authors don’t tell stories the same way. Some start with a total concept and fill in the details. Others know the beginning and let the story flow to its own conclusion. Still others start at the conclusion and build a story from back to

front. Neither do they pose their plots' central problems or conflicts in the same manner. In fact, some author's leave this decision to the very end. War Rooms can also work in such different ways. It is important to recognize from the onset that different participants may operate at different levels of understanding and on different parts of the story throughout the process. They all harbor unique perspectives.

*Learn* - After the key chapters have been identified and bounding the right problem has started, the learning phase begins. At this point, recognized leaders and experts in specific areas of interest should be brought in to review and amplify the story in their areas of expertise. In effect, they "teach school." This phase can include individual or group sessions.

*Synthesize* - After each learning session, a "hot wash-up" should be conducted to review the outline and story. Chapters may be revised, new chapters created or a completely new storyline pursued in a search for new findings, new common ground and clarification where the experts have agreed or disagreed, setting up additional sessions. As this phase evolves, the War Room should be taking on the look of a "Work Room," where a first-cut story is completely outlined.

*Teach* - As new people are brought into the War Room, they should be formally oriented to the storyboard and the storyline. The relationship between the "learn" and "teach" phases is similar to a teacher's staying one step ahead of the students or "each one, teach one."

*Task* - In this phase, the essential elements of the story should be vigorously fleshed out, studies initiated, models exercised and data gathered. Some of this can be assigned, or tasked, informally as players pass through the War Room. However, some data must be formally tasked and gathered. Here, three things are extremely important: (1) the role of a recognized charter and sponsor for the War Room, (2) having a client-member assigned to the War Room staff and (3) the effectiveness of the War Room leader.

*Advocate/Test* - This phase is the beginning of the "Show Room" evolution. As the story reveals solutions, they must be actively tested and advocated to gain the broad consensus needed for implementation. Consensus-building is helped if the story is "sellable" to different managerial levels of the client's staff and the principal constituencies involved, as well as, to people who may be predisposed to oppose the solutions. Different echelons inside and outside of the organization will require different types of information – and consequently different types of "buy-in" – if the plan is to be successfully executed. As the story is tested with various participants it will inevitably change and become more robust.

*Decide* - Ultimately the leadership must participate in the War Room either separately or in formal "decision making" sessions to resolve competing alternatives. Successive disclosure and their real time guidance and wisdom can prevent an enormous amount of wasted motion and increase the priority given to the War Room

by the organization as a whole. This can usually be accomplished with very little time invested but is critical to War Room success.

*Document* - The particulars of the story should have been formally documented from the start of the process. The use of hard copy view graphs to tell the story is only the first step of the documentation process. In general, all data gathered – including notes on who said what and when and in what context – should be filed to support the story. Ultimately, a formal written report summarizing the major results of the War Room may also be required.

## **Techniques for Implementation**

In addition to the key objectives of each phase, three techniques need to be introduced to further expand on this methodology.

The first technique, *parade participation*, refers to the intentional use of free flowing, one-at-a-time or two-at-a-time visitor traffic through the War Room. Such a technique is required because the experience and expertise required to manage the sequential phases of an effective War Room hardly ever reside in one or two people. Parade participation allows the War Room staff to capture key people as they become available or as they are needed for the story to unfold. Moreover, people are invited to just “drop in” when they can and keep up. In this respect, all Strategic Insight War Rooms are “open.”

The tactile, visible and modular nature of a War Room aids parade participation and allows the storyline to be presented in a manner that cuts across all disciplines and groups. Expert storylines can be connected with general storylines. The very presence of good storyboard charts usually challenges intelligent reviewers to make individual inputs. While gathering contributions, synthesizing inputs and displaying story revisions on the storyboard, the War Room staff should seek to find common ground and build consensus. Later, when briefing the storyboard to the ultimate decision makers, the staff should find that consensus has already been achieved on much of the subject matter and that individual pockets of expertise and advocacy have been built within the client organization or in the wider community.

A second significant technique useful in a War Room is the ability to *fall out/fall back in*. Because a War Room is a recognized, chartered function operating out of a semi-permanent space with a dedicated professional staff, it can readily execute “fall out” procedures when required. The War Room effort can be interrupted and both the assets and staff can be redirected to deal with related or unrelated program emergencies, commonly called “fire drills.” During this time the storyboard usually remains in place on the walls. “Fall back in” can then be easily accomplished when the organization is ready to proceed, since the storyline will still be on display. After a period of inactivity, the staff can pick up the story and continue, much like an author who puts his manuscript away for awhile and picks it up later to continue writing.

The third technique is to capture the *minority position*. A voice in the wilderness or a renegade thinker can often represent leading edge thinking and just as often can be found in the minority. Storyboarding that targets and documents well-conceived differences of opinion on major aspects of the story – especially those differences which significantly alter the outcome of the story – can serve two important purposes. First, it ensures that each participant knows that his views will be heard. Second, and more importantly, it provides a road map that could be of major importance if for any reason the process must be revisited. Essentially, minority positions mark the intersections where the storyline could significantly change.

## **Summary**

The Planning Center Process is an excellent organizational tool for high-pressure, high-risk problem solving. It can be applied equally well to complex managerial or technology-dominated problem solving situations. It can be applied to large or small problems. It can be used to devise a five year plan or "how to get to Monday." It is especially adaptable to dynamic environments during periods of transition which are characterized by great change, uncertainty or consternation. Such transitional environments can result from the introduction of new technology; a risky business climate; a business's transition from private to public management or from an entrepreneurial to a more formal organizational makeup; or simply a program's change in leadership.

Successful companies or government agencies should have a vision that is flexible, readily adaptable to future new demands and, above all, *executable* by large numbers of people. The Planning Center Process provides a proven method to gain that flexibility and executability. Furthermore, maintaining a War Room after its most intense phase for later use as an orientation center can serve to capitalize on the initial hard-won effort, creating a lasting resource for creating new ideas, directions and plans.

Strategic Insight has built a reputation as a high caliber, hands-on planning consulting firm, in part, through the use of War Rooms. We are convinced that the Planning Center Process can help our clients make visible, sustained progress toward meeting their goals. Please contact us if you would like to learn more about this process.

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