



THE JDR SMART™ GROWTH SOLUTION

A better way to envision, plan for and achieve growth

Strategic planning often ends up being a colossal waste of time, pulling teams away from practical work. It's difficult to execute and frequently done poorly. Many leaders have had frustrating experiences hiring consultants — highly intelligent people who arrive, analyze, and make recommendations that ultimately end up on a shelf. Why? Because these consultants have either never led a business to sustained success or failed to engage the real difference-makers in the strategic planning process.

Over the past four decades, I've been fortunate to work with leaders who excel at strategic planning and business building. Drawing from these experiences, I've developed a unique approach that I've used as a CEO, COO, President, CMO, and now as a consultant. This approach has helped to:

- Turn around struggling businesses
- Reignite growth in cash cows thought to be stagnant
- Realize the full potential of growth engines
- Successfully launch new-to-world ideas
- Integrate acquisitions into synergistic, thriving organizations
- Align family owners on a vision for a prosperous future

It's About the Planning, Not the Plan

As U.S. General Dwight D. Eisenhower once said, "It's about the planning, not the plan." This insight resonates deeply. Many leaders believe that a few days offsite can produce a strategic plan that solves everything. But the true value of strategic planning comes from the collaborative sessions of probing, analyzing, and building the plan — not simply distributing it as a finished product.



Successful strategic planning isn't about control; it's about harnessing the collaborative spirit and ingenuity of your people.

When most people hear “plan,” they think of something concrete: a travel itinerary or a construction blueprint. These kinds of plans are precise, organized, and predictable. But in the fluid, unpredictable environment of business, the approach needs to be more adaptive, more akin to military strategy — dynamic and resilient under pressure.

Successful strategic planning isn’t about control; it’s about harnessing the collaborative spirit and ingenuity of your people. Like a coxswain directing a rowing crew, the goal is to focus collective energy where it matters most, leading to sustained growth. Leaders seeking to eliminate ambiguity entirely through strategic planning are often left disappointed. Inevitably, when their plan doesn’t predict the future flawlessly, they deem the whole exercise a failure.

Ten Critical Strategic Questions

1. Who are we?
2. What sets us apart?
3. What do we believe?
4. How do we agree to treat each other?
5. How can we leverage our strengths?
6. Where are we going?
7. What does success look like?
8. What are the main obstacles to success?
9. What’s the plan?
10. How can each person in your organization connect their work to the plan?

Addressing an Epidemic of Disengagement

Strategic planning aims to simplify operations and accelerate progress on key initiatives, but strategy alone isn’t enough. While strategy is clearly critical, at JDR we believe that improving organizational engagement is the biggest lever a leader has at their disposal. Why? Because more engaged workforces deliver significantly better results.

- Companies in the top quartile of engagement scores had 50% higher total shareholder return than the average company (Aon Hewitt)



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- Highly engaged employees are 87% less likely to leave their organization (Business Leadership Today)
- There is a 78% difference in absenteeism between highly engaged and disengaged business units (Gallup)
- Engaged workplaces see 70% fewer safety incidents (Business Leadership Today)
- Companies with highly engaged employees score 12% to 34% higher in customer satisfaction ratings (Vance & Associates)
- Engaged employees exhibit 17% higher productivity and 60% higher quality than less engaged employees (Insync Surveys)

Unfortunately, disengagement is rampant in organizations today and it's been increasing since 2020 — many employees feel disconnected from their company's strategic goals. Research by Franklin Covey revealed that only 15% of employees could name one of their company's top three goals, and of those, only half felt committed to achieving it. A staggering 87% of respondents had no idea how their work contributed to company goals, and only 21% said they were willing to step up and go the extra mile for their company if asked.

Many employees also lack coaching and guidance. A Gallup survey found that 8 in 10 workers believe their boss lacks vision, and 6 in 10 would rather have a new boss than a pay raise. Effective strategic planning must connect people to goals in a way that is personally relevant and motivating, and it must address this lack of engagement to be successful.

Your organization might be better, but clearly most organizations are not effectively connecting their people to their goals in a way that is personally relevant, let alone motivating.

Strategies designed to drive profitable growth require changes in human behavior. But the data suggests strategies that might have looked promising in the boardroom are not making their way to the front lines with the clarity required to drive workforce commitment. It is wishful thinking to expect workers to clairvoyantly lift themselves up from the grind of their day-to-day work and change their behavior without a significant amount of communication, context, and a motivating answer to the critical questions; "How does my work help us win, and how do we define winning in the first place?"



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Use Planning to Fuel Engagement

Thorough analysis and strategic thinking are foundational to good planning, but even the smartest plans can fall flat without workforce engagement. I've seen mediocre strategies produce excellent results when executed by a committed, aligned workforce, while brilliant strategies flounder due to lack of commitment. To be effective, strategic planning must engage key players at every level, not just leadership.

The core leadership team should lead the planning but also include cross-functional sub-teams to ensure broader insights and foster greater ownership. This iterative, inclusive process builds commitment from the outset, rather than expecting buy-in at the end. It also produces a more robust plan with fewer blind spots that might hamstring future execution.

Engagement and alignment are sparked through constructive contention — a process that encourages open, honest, and respectful disagreements to challenge ideas and enhance decision-making. By fostering healthy debate, constructive contention empowers teams to explore diverse perspectives without fear of conflict.

Every team we work with can benefit from embracing this approach, whether they tend to hold back and avoid sharing their true thoughts, or engage in unproductive unhealthy debates. At JDR, we guide leaders in recognizing the value of constructive disagreement, teaching them how to use it effectively to drive resolution, alignment, and ultimately, improved execution.

The JDR SMART™ Growth Solution

The purpose of the JDR SMART™ Growth Solution is to preserve what made an organization successful in the first place while helping drive the change needed for it to thrive and achieve its full potential. The planning process should be seen as an engine for sustained growth, involving strategic execution and agile course correction fueled by fact-based learning, team collaboration, and organizational change management.



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SMART™ = Strategic + Momentum + Aligned + Results + Teamwork

Strategic

Leaders are often promoted to expanded roles because they delivered results by being action oriented, but not necessarily strategic. Sustained profitable growth requires a strategy that fuels market-meaningful uniqueness executed with excellence over the long haul. Of course, execution is critical, but long-term strategy based on a clear and compelling vision of success becomes increasingly important the higher you climb up the leadership ladder.

Momentum

Whether leading a turnaround or sustaining a growth engine, leaders need to accelerate progress sooner than later. The more momentum a team or organization has, the harder it is to stop.

Aligned

Even the best strategies will fall short if they are not executed by a team that is fully aligned and committed to the vision and the plan to make it reality.

Results

Results matter most. Strategy, innovation, talent, culture, communication, and execution all matter only in their role to deliver results. Certainly, how they are achieved matters, but at the end of the day leaders will be evaluated based on the results achieved.

Teamwork

A leadership team can be much more powerful than the sum of its parts if it is led and cultivated wisely. To make it happen, team members must collaborate respectfully, proactively engage in constructive contention and be secure enough to embrace diversity of thought and talent that are complementary. Team members should be confident that their teammates will prioritize the good of the team over servicing their ego.



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The JDR SMART™ Growth Process

ALIGNMENT	Getting present and aligned on your why
ASSESSMENT	Assessing your current situation and formulating strategic implications
ENVISIONING	Envisioning and articulating what longer term success looks like
STRATEGY	Building strategic direction and focus on what matters most to achieve your vision
EXECUTION	Accountably operationalizing the plan, learning and course correcting with agility



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The JDR SMART™ Growth Solution is a five-step journey that starts with ALIGNMENT. It is the foundation upon which the vision and strategic plan is built, and the plan is operationalized.

Too often teams assume they have alignment on fundamental questions and principles when they do not, and they jump too quickly into planning the actions they want to take to fix pressing challenges.

While this might quench their desire to solve and act with urgency, it can lead to misaligned execution down the road. The organization operates out of sync, the culture resists the changes required to execute the plan with excellence, and unanticipated obstacles hamstring results.

Just as a building requires a strong foundation before raising its walls and roof, organizations need to take time to align on fundamental principles and cultural values to ensure long-term, sustainable growth.

In my next whitepaper, I'll detail how to lead a team through the ALIGNMENT phase of the JDR SMART™ Growth Solution to help them:

- Find alignment on fundamental values, principles and answers to key strategic questions
- Align on the strengths they can leverage and the weaknesses they must address
- Set behavioral norms to encourage a healthier culture going forward

Learn more about the JDR SMART™ Growth Solution at jdrgrowthpartners.com



About the Author

Jude Rake is the founding principal of JDR Growth Partners, a consulting firm that helps family-owned businesses, boards, chief executives, and their leadership teams achieve improved results and sustainable growth. Before founding JDR, Jude served in multiple C-level roles including CEO for fifteen years. Jude is also the author of *The Bridge to Growth: How Servant Leaders Achieve Better Results and Why It Matters Now More Than Ever*. Find out more at jdrgrowthpartners.com and [The Bridge to Growth](#).



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