

### Insights from NIA's Young Professional Advisory Committee (YPAC) Mentor Program

NIA's unique mentoring program continues, recently pairing NIA Board of Directors member Rick Sutphin of Performance Contracting, Inc. (PCI) with YPAC member Ashley Luse DeBoer of Luse Contracting Group.

The two had virtual one-on-one sessions and then shared highlights of their conversations with the YPAC audience during NIA's Fall Summit in November 2023.

# UNLOCKING SUSTAINABLE STRATEGIC PLANNING: Insights and Best Practices from an NIA Mentorship Pairing

*By Ashley Luse DeBoer*

I had the privilege of participating in NIA's YPAC Mentor Program, being paired with Rick Sutphin to explore the topic of strategic planning and deliver a presentation to the YPAC members at the 2023 Fall Summit.

## Introduction

We began by highlighting the essential alignment between strategic planning, goal setting, and adherence to core values. Rick defined strategic planning as designing a trajectory for where a company wants to go in 1, 3, and 5 years and beyond, and then setting the processes in place for getting there. The YPAC members revealed varying degrees of awareness and involvement of next-gen leaders in their companies' strategic planning processes, which highlights the importance of understanding and engagement with a company's strategic plan at all levels within an organization.

## The Importance of a Sustainable Process

An effective strategic plan starts with setting a crystal-clear vision that aligns with market dynamics and services, thereby defining the company's desired direction. Once the vision is set, it is critical to create a structured process with built-in accountability channels. Rick emphasized the importance of routine strategic planning sessions and meticulous agendas to address all crucial aspects.

Rick walked through PCI's methodical approach to planning, commencing in January with a weeklong leadership group offsite, followed by branch-level strategic planning meetings where annual goals are set, and culminating in upward board presentations and downward cascading information to managers and employees. I was impressed to learn that PCI's leadership group goes on their annual

strategic planning getaway the same week every year, and Rick inspired me to take my own team's annual strategic planning meeting outside the office this year.

At Luse, we follow a strategic planning process inspired by the book *Traction*, by Gino Wickman, and the Entrepreneurial Operating System (EOS). We set annual and quarterly goals, and our managers each commit to a set of "Quarterly Rocks," which are the items that must happen to keep our organization on track for that quarter.

## Lessons Learned and Audience Interaction

Sharing insights gleaned from Rick's mentorship, I stressed the need for an earlier start to Luse's annual planning process, leveraging real-time data through dashboards for informed decision-making, and the instrumental role of an Internal Audit Committee to evaluate our processes. At Luse, we already lean on our Board of Advisors to hold management accountable to our strategic plan, but I came away from my conversations with Rick with ideas for how to engage our Board even further.

Audience engagement and discussions on processes further enriched our YPAC session, shedding light on the practical applications within our various organizations.

## Culture, Core Values, and Strategy

The enduring quote, "culture eats strategy for breakfast," resonated with the group, emphasizing the fact that a great strategic plan can be either bolstered or derailed by an organization's culture.

Rick emphasized the critical need for a company's strategy to be aligned with its core values, underscoring the foundational role of a leadership team to be involved not only in guiding strategic

initiatives but also with the core values. He spoke about the fusion of culture and strategy, highlighting the importance of a top-down approach in embedding values into a company's ethos.

Expanding on this, I outlined Luse's cultural initiatives, highlighting our integration of strategic planning with our company's four Cultural Cornerstones. The holistic approach embraced by Luse, from hiring and culture onboarding to annual culture surveys and manager reviews, illustrates another contractor's ambition to fuse strategy with a vibrant organizational culture.

### Additional Resources

We wrapped up the session by providing a list of recommended resources for a deeper study of strategic planning. Our book recommendations included the aforementioned *Traction* by Gino Wickman and *Turning the Flywheel* by Jim Collins,

complemented by practical tools such as the EOS Model (see [www.eosworldwide.com](http://www.eosworldwide.com)), which provides a toolkit for businesses needing a more structured strategic planning process.

I feel extremely grateful to have received Rick's mentorship this past year. (Thank you, Rick!) I hope this brief glimpse into our discussions provides more NIA members with a few nuggets of wisdom when it comes to strategic planning.



*Ashley Luse DeBoer is the President of Luse Contracting Group, a fifth-generation, family-owned mechanical insulation contractor with offices in Chicago, Illinois, and Milwaukee, Wisconsin. Ashley is a past Chair of NIA's YPAC. Learn more about participation in YPAC, including the YPAC Mentor Program, at*

[www.insulation.org/membership/ypac](http://www.insulation.org/membership/ypac).