

# Fundamentals of Strategic Planning

## Basic Steps in Strategic Planning

- Identify your core values
- Develop a shared vision
- Analyze the situation
- Create a strategic agenda
- Establish measurable goals and objectives
- Establish a strategic action plan
- Assign responsibilities and timelines with each objective
- Write and communicate an action plan
- Acknowledge completion & celebrate success

## Getting Ready to Plan

### Who should be involved in planning?

- Always include at one person who has authority to make strategic decisions.
- Involve those responsible for writing and implementing the plan.
- Involve someone who will be expected to carry out the plan actions.
- Involve someone who the plan will effect.
- Involve someone to administer the process

### Strategic planning operating guidelines

- Participation is encouraged. Your ideas will enrich the session.
- Take time to get to know other planners.
- You are encouraged to ask questions.
- Each person has a contribution to make.
- Respect confidentiality.
- Leave personal agendas, at the door.
- Everyone must adhere to assignment expectations as best as possible.
- Nobody is wrong.

## Vision Squashers

Vision is what keeps an organization making progress, even against discouraging odds. It is a powerful motivator. These go against vision:

- Tradition
- Fear of ridicule
- Stereotypes of people, conditions, roles, and governing councils
- Complacency of stakeholders
- Fatigued employees
- Short-term thinking
- Nay-sayers

## Preparing a Strategic Agenda

- Define the current state of the organization (the SWOT analysis)
- Define the direction you want the organization to go (the vision)
- Define how you want to go from the current state to the desired state (the strategic agenda and plan)

## SWOT analysis

- **Strengths:** Internal qualities of an organization that allow them to take advantage of prospects and reduce the impact of threats
- **Weaknesses:** Internal qualities of an organization that could get in the way of reaching goals and taking advantage of opportunities
- **Opportunities:** Constructive external trends or events that may influence the organization in a positive way
- **Threats:** Factors outside the organization that stand in the way or prevent them from achieving their desired outcomes

## Guidelines for Writing SMART objectives

- **Specific:** Does it specify exactly what is desired? Is it clear?
- **Measurable:** Can it be measured objectively? Will success be obvious?
- **Achievable:** Can it be realistically achieved?
- **Relevant:** Does the goal pertain to the overall mission and values?
- **Timely:** Is this goal appropriate at this time?

## Action Plan Template

- Strategic goal
- Objective
- Responsibility
- Actions
- Timeline
- Measurement
- Resources

## Monitoring and Evaluation

- Review progress monthly
- Adjust the plan if necessary, documenting the reason for the change
- Acknowledge success