

Values Driven Solutions Strategic Planning Guide

Provided By:



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Name of Organization



**STRATEGIC PLANNING
PROCESS**

*“Never doubt that a small group of thoughtful, committed people
can change the world – indeed it is the only
thing that ever has!”
-Margaret Mead*

Strategic Plans are roadmaps that guide the implementation of objectives, goals and actions within an organization. A Strategic Plan is not used to *regulate* activities, but instead *outlines* the basis to achieve certain results, and provides the means to alter the course of action should the desired ends change.

Strategic Plans:

- Serve as a framework for decisions or for securing approval/support
- Provide a basis for detailed planning
- Explain the business to others in order to inform, motivate and involve
- Assist benchmarking and performance monitoring
- Stimulate change and provides building block for any other plans

STEP 1: ALIGN VALUES, VISION & MISSION

*“If we are together nothing is impossible.
If we are divided all will fail.”
-Winston Churchill*

The first step of a Strategic Plan is to come together as an organization and decide on shared values, a compelling vision and an energizing mission for the organization as a whole. This alignment of core values, vision and mission will be the groundwork for the entire Strategic Planning process, with this in mind make sure they predict the direction in which the organization should be heading.

Definitions:

Shared Values Are:

BELIEFS we share that
guide our decisions

Compelling Vision Is:

*Our **IMAGE** of who we are
and how we want to be remembered*

Energizing Mission Is:

*What we **DO** each day*

STEP 2: IDENTIFY BROAD AREA'S OF EMPHASIS

The second step of the Strategic Planning process is assessing the existing strengths, weaknesses, threats and opportunities of the organization. Strengths and Weaknesses are internal to an organization while Threats and Opportunities are external. This step will help define the specific area's that need attention or expansion, etc. within the organization. Below are seven general categories found within a Strategic Plan. Think about specific places within each category that are strengths/weaknesses, or threats/opportunities.

Area's for Emphasis of Strategic Plan

1. Finance/Budget
2. Sales/Marketing
3. Procedure/Services/Production
4. Operations/Administration
 - Technology
 - Facilities
 - Systems/Support/Process
5. People/Staffing/Human Resources
6. Partnerships/Professional Relationships
7. Community Initiatives

S.W.O.T. Analysis

Strengths

Weaknesses

Opportunities

Threats

**STEP 3: ESTABLISH OBJECTIVES ALIGNED WITH
VALUES, VISION AND MISSION**

*“A set definite objective must be established if we are to
be able to accomplish anything in a big way.”*

-John McDonald

Review the broad area's of emphasis that you focused on in Step 2 of the Strategic Planning Process. A broad objective needs to be created for each area of focus. Objectives are broad statements describing the desired results to be achieved by the implementation of a Strategic Plan. Objectives are statements of attainable, quantifiable achievements that help to implement a guide for the implementation of specific goals.

Objectives Must Be:

- Consistent with organizations Values, Vision and Mission
- Focused on a result, not on an activity
- Attainable

Example: Finance/Budget Objective – Improve financial reporting systems and capabilities

Since the first step of this Strategic Planning process was to create shared values, vision and mission for the organization, you have something that will guide the objectives that you are creating. Look at your mission statement and create objectives that will move you toward accomplishing that compelling mission. Make sure your objectives are broad and general for each area of emphasis. Setting goals and action steps for each objective will be the next steps in this process. Concentrate on keeping the objective broad.

**STEP 4: ESTABLISH GOALS ALIGNED WITH
VALUES, VISION AND MISSION**

*“It is the goal that shapes the plan; It is the plan that sets the action;
It is the action that achieves the result; and it is the result
that brings the Success”*
-John C. Maxwell

Creating goals for each broad objective begin to map out the direction that needs to be taken to achieve an objective. Goals are mileposts that mark the progress that is being made in accomplishing objectives. This step in the Strategic Planning process is vital to its success. The act of recording goals sends a message to our subconscious about what is valuable. The simple act of writing out goals actually triples the probability of achieving those goals.

3 Steps to Goal Setting Success:

1. Remember S.M.A.R.T Goal Setting:
S pecific
M easurable
A chievable
R ealistcally High
T ime Sensitive
2. Process for Goal Setting
 - Establish a Plan
 - Convert the Plan to writing
 - Implement the Plan
 - Monitor and Adjust the Plan

3. Goal Achievement Strategies
 - Know what your ultimate annual goal is and translate it into daily, weekly, monthly and quarterly action items
 - Confirm that monthly goals are on target to reach your annual goal
 - Record and measure your progress at least quarterly
 - Develop a specific list of action items
 - Use and implement a weekly itinerary system
 - Monitor - reassess - adjust - persevere!!!

**STEP 5: ESTABLISH ACTION STEPS ALIGNED WITH
VALUES, VISION AND MISSION**

“Follow effective action with quiet reflection. From the quiet reflection will come even more effective action.”

-Peter Drucker

This is the assignment part of the Strategic Plan where every individual involved is given a specific piece of the process to accomplish. The Action Steps are the individual objectives that break down the steps that are needed to accomplish each goal. Depending on the size of the goal, the process can take weeks, months or even years to complete. Breaking the goals down into attainable action steps will help individuals understand their role and responsibilities in the process.

There are four main components in an Action Step; description, details, the name(s) of individuals who will complete the step and a due date. The description is the broad title for the Action Step. The details will give specific steps on how to accomplish that action step. The names of all individuals involved in the action step need to be listed. It is important to have the names of the individuals who will be a part of the process so everyone knows who to go to with updates, questions and concerns. And finally, a due date will help to keep the progress on track.

STEP 6: FEEDBACK

Metrics, Measuring, Reporting, Benchmarking

What is the use of a Strategic Plan if the results cannot be seen? The feedback process is made up of three main parts:

1. Specific Purpose
2. Specific Intervals
3. Specific Parties

Every month there should be an update meeting where individuals can share their progress with action items as well as express questions or concerns. The meeting should also be used as a reminder of the purpose of the Strategic Planning Process, as well as a time to share encouragement and support to all the members of the Team.

Action Steps Worksheet

Objective: _____

Goal: _____

Weekly Action Plan - From ___/___/___ to ___/___/___

ACTION ITEM	DETAILS	BY WHOM	DUE DATE
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			

Action Steps Worksheet

Objective: _____

Goal: _____

Monthly Action Plan - From ___ / ___ / ___ to ___ / ___ / ___

ACTION ITEM	DETAILS	BY WHOM	DUE DATE
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			

Action Steps Worksheet

Objective: _____

Goal: _____

Yearly Action Plan - From ___ / ___ / ___ to ___ / ___ / ___

ACTION ITEM	DETAILS	BY WHOM	DUE DATE
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			
_____ _____			