



Simplified Strategic Planning

Taking Control, Involving Employees & Linking Systems

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Strategic Planning

Key Questions



● WHAT

- ❖ Is Strategic Planning
- ❖ Can it do for my organization

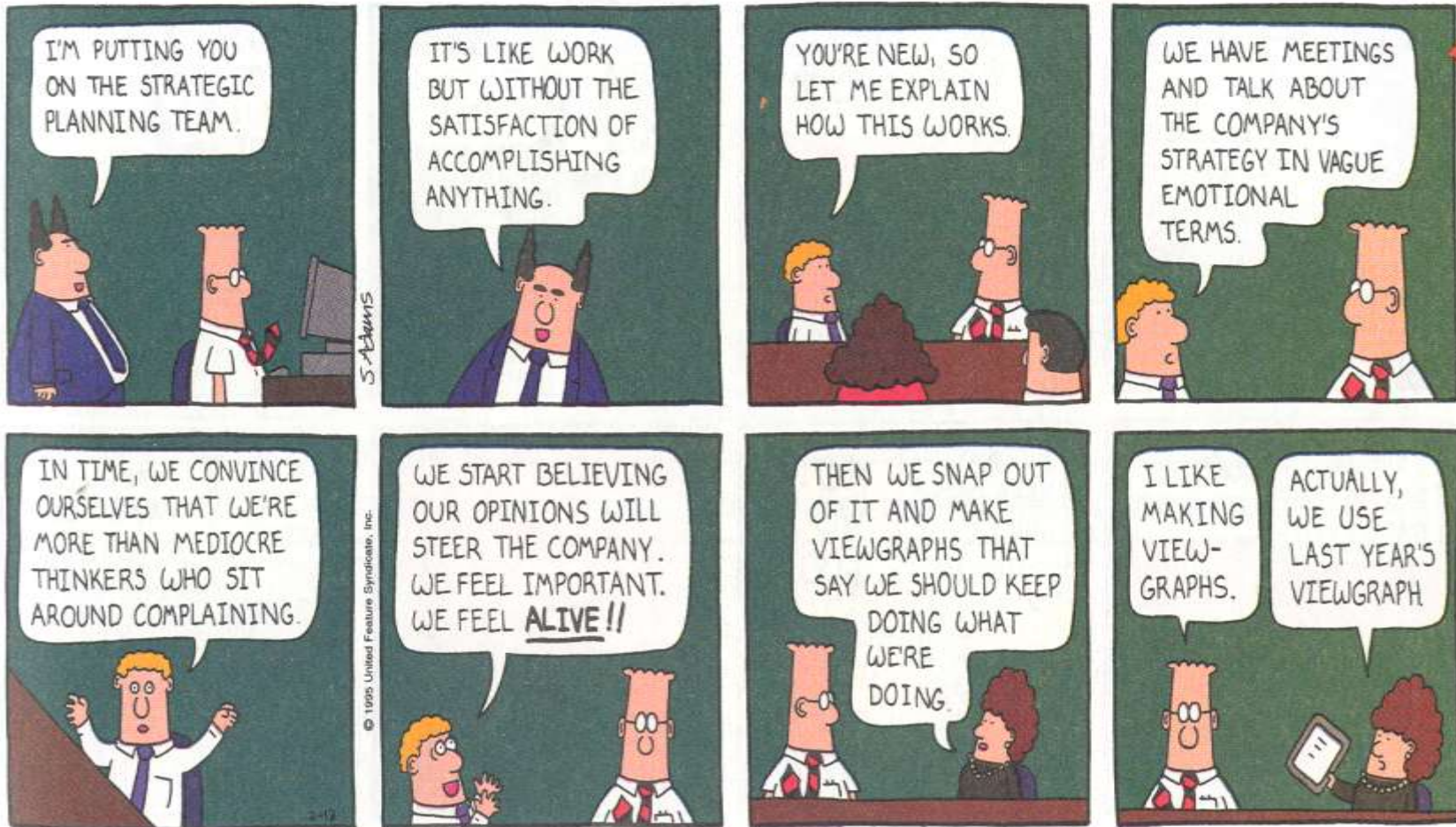
● WHO

- ❖ Should be involved

● HOW

- ❖ Do we construct a Strategic Plan

Strategic Planning – One View



The World Class Organization



- ❖ Mission-driven and strategy focused
- ❖ Dynamic system of initiatives, strategies, and measurements
- ❖ Initiatives and strategies linked to budgets
- ❖ All employees involved in planning and execution of initiatives and strategies
- ❖ Strategic human capital needs assessed and projected
- ❖ Sustained by organization-wide learning and knowledge management



What Is Strategic Planning?

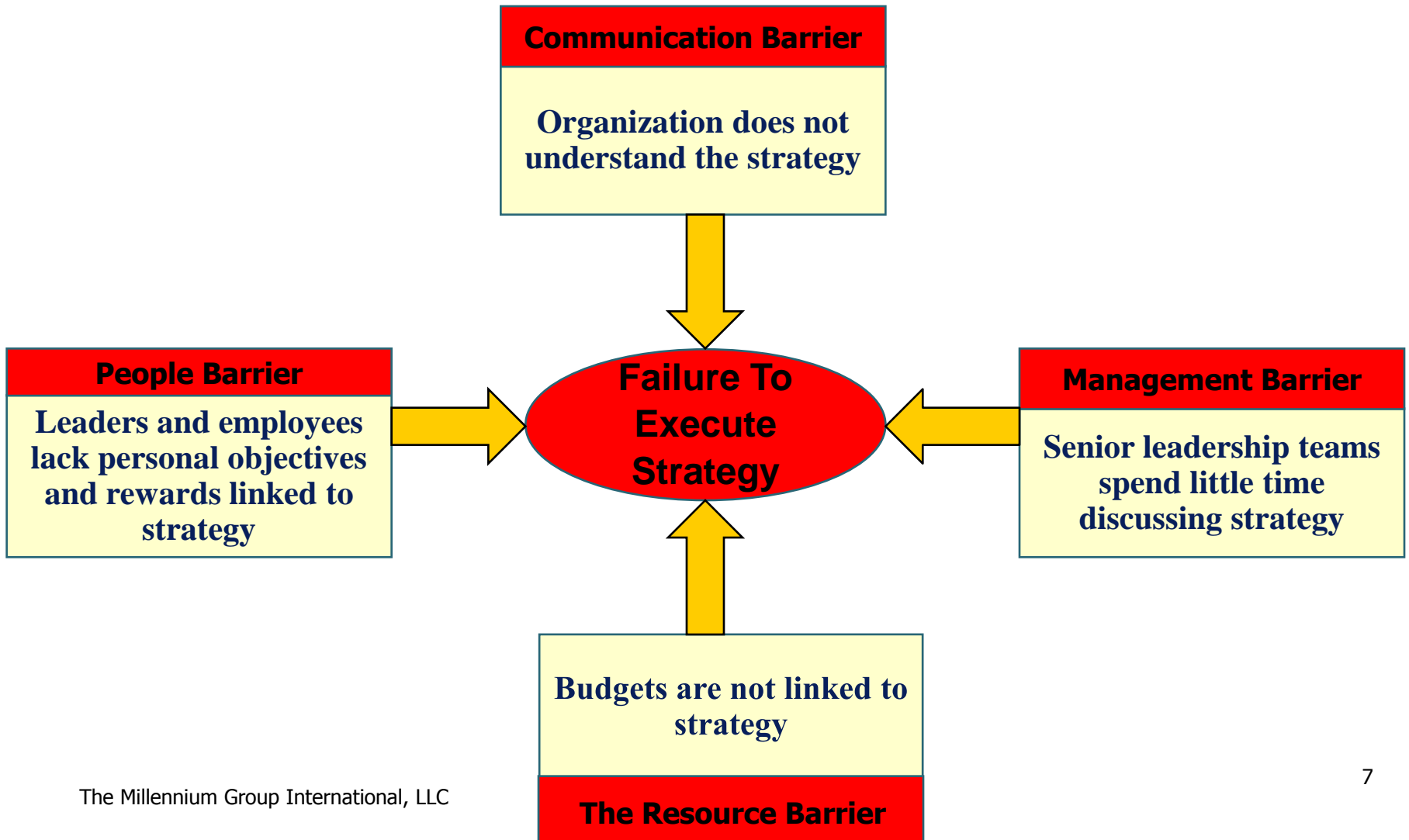
- A continuous and systematic process
- A fact-based projection of the future
 - ❖ Structure, operation, initiatives, expected results
- Identification of methods, measures, resources to achieve that future

Benefits Of Strategic Planning



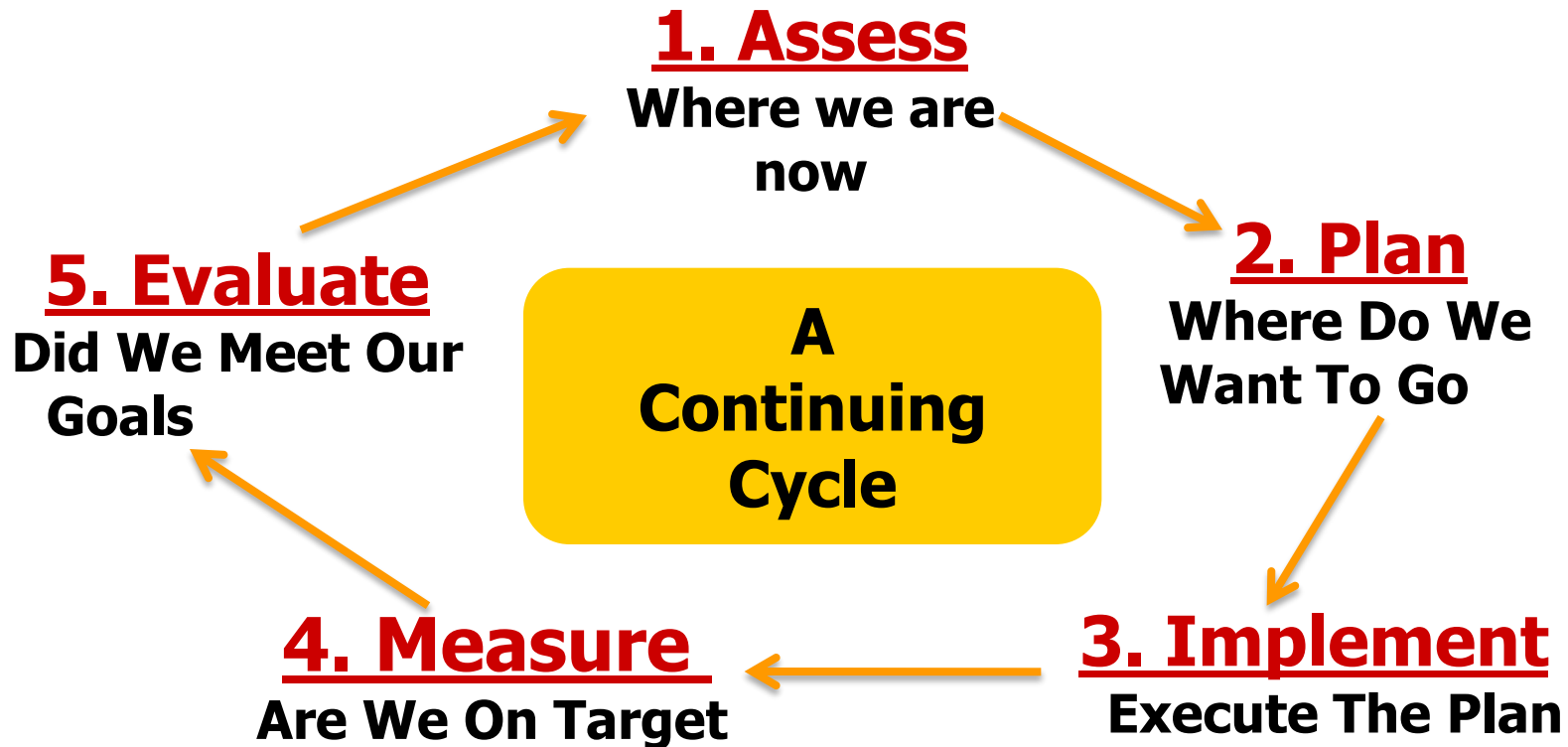
- A commonly understood roadmap for the future
- Focus the organization on common goals
- Align resources with strategic objectives
- Employees become knowledgeable and involved
- Employees know where they stand as individuals and teams
- Employees are held accountable

Barriers to Strategy Implementation





Strategic Planning Model



Strategic Planning

Key Steps



- Step 1 - Prepare
 - a. Design Process
 - b. Assess Environment
- Step 2 - Develop Vision, Mission, Values
- Step 3 - Develop Goals and Objectives
- Step 4 - Identify Strategies, Measures,
Resources
- Step 5 - Communicate
- Step 6 - Evaluate
- Step 7 - Replan



Strategic Planning

Step 1a – Design Process

- Outline major steps and tasks in the process
- Identify people who will contribute to each step of the process
- Set the sequence and timetable of events
- Identify barriers and ways to overcome



Strategic Planning

Step 1b – Assess Environment

- Identify customers, stakeholders, suppliers, partners, competitors
- Check mandates & guidelines as they pertain to current business and future activities.
 - ❖ Organizational priorities and requirements
 - ❖ Budget status and projections
 - ❖ Laws, Rules, Regulations
- Identify Strengths, Weaknesses, Opportunities for Improvement and Threats – (SWOT)



Strategic Planning

Step 1b – Assess Systems

- Leadership
- Strategic Planning
- Customer and Market Focus
- Measurement, Analysis, and Knowledge Management
- Workforce Focus
- Process Management
- Results



ELEMENTS OF A STRATEGIC PLAN

MISSION *Why we exist*

VALUES *What's important to us*

VISION *What we want to be*

STRATEGIC GOALS

STRATEGIC OBJECTIVES

STRATEGIES

PERFORMANCE MEASURES

RESOURCES



Strategic Planning

Step 2- Vision Statement

A Good Vision Statement is:

- Clear and memorable
- Aligned with values
- Linked to customer and stakeholder needs

Strategic Planning

Step 2 - Mission Statement



- Describes the reason the organization exists
- Describes the function the organization serves
- Describes for whom the organization serves this function

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Step 2 - Values Statement



- A code of conduct for doing business
- Guidelines for the conduct of interactions
- A basis for organizational decisions

Strategic Planning

Step 3 - Develop Goals



- Long-range change targets
- Guide efforts in moving toward a desired future state.
- Build on Strengths and Opportunities
- Address Weaknesses and Threats

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Step 3 – Develop Objectives



- Define how the strategic goal will be achieved
- May be several objectives for each goal
- Identify element of quality, quantity, time
- Identify person(s) responsible

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Step 4 - Identify Strategies



- Detail activities that will be followed to complete each objective
- Identify deliverables that should result from completion of individual steps
- Identify person(s) responsible

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Step 4 – Identify Measures



- Identify the quality, quantity, timeliness or other performance measures by which progress toward and completion of each objective(s) will be judged.
- Identify how, by whom and how often measurement of progress toward the completion of the objective(s) will take place.

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Step 4 – Identify Resources



● People

- ❖ How many employees will be needed to execute the strategy
- ❖ What skills, knowledge, and abilities will be required
- ❖ How can organizational learning be developed, spread and retained

● Space, Equipment, Technology

- ❖ What will enable employees to execute the strategy

● Financial

- ❖ Link budget to performance and results

Strategic Planning

Step 5 - Communicate



- An internal and external marketing campaign to:
 - ❖ Create awareness
 - ❖ Affect behavior
 - ❖ Help achieve strategy and objectives
- Communication devices:
 - ❖ Announcements, Videos, Town Meetings, Brochures, Newsletters
- Follow-up continually - report the status of outcomes on:
 - ❖ Bulletin boards, Newsletters, Groupware, Electronic Networks

Strategic Planning

Step 6 - Evaluate



- Review Goal and Objective Achievement
- Review Measurement Results
- Review Methods, Measures, Resource Allocation

Strategic Planning

Step 7- Replan



- Review results of evaluation (Step 6)
- Reapply the planning process
 - ❖ Step 1 – Prepare
 - Design Process
 - Assess Environment
 - ❖ Step 2 - Develop Vision, Mission, Values
 - ❖ Step 3 – Develop Goals and Objectives
 - ❖ Step 4 - Identify Methods, Measures, Resources
 - ❖ Step 5 – Communicate
 - ❖ Step 6 - Evaluate

The Strategy Driven Organization Recap



- More than a plan - A continuous process
- All employees should participate
- Involves every system
- Measurement is critical

