

5 STEPS FOR

# Strategic Planning

SUCCESS

LEARN HOW TO  
CREATE A PLAN  
FOR YOUR AGENCY  
THAT WORKS!

*SAMPLE  
PLANNING  
TEMPLATE  
INCLUDED*



**TOM | okarma**

# 5 Steps for Strategic Planning Success

**It's hard to believe that planning for next year is right around the corner.**

Maybe a few of you have already begun. If so, good for you. Unfortunately however, strategic planning for many agencies—assuming they even have a plan—consists of one of the following:

- “freshening up” last year’s plan and running with it
- conducting a SWOT analysis and calling it a day
- committing to just working harder in the new year



**Experience tells me** agencies either avoid or give short attention to strategic planning because they had a bad previous experience, feel strategic planning is only for large agencies, don't want to wrestle with setting priorities or making some hard decisions or, simply don't know how to do it or what's involved.



In light of these reasons and to encourage more agencies to give strategic planning another try, I am offering five suggestions — proven ways — that will help make your next planning session a success.

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1. Spend time before the actual planning session gathering fact-based information on the environment you are working in.

Sometimes called an external scan, this exercise insures your team will be working from facts, not opinions once the discussions begin.



2. Include both key staff and leaders in the planning session.

They all have unique perspectives and will add significantly to the credibility, actionability, and effectiveness of the final product.

3. Don't be afraid to invite a "prickly pear" or two to join the group.

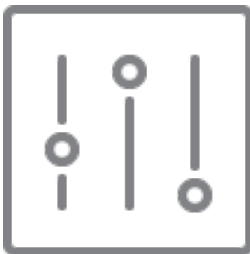
Creating a plan requires a diversity of responsible opinions so don't be afraid to invite knowledgeable and devoted individuals who are unmoved by "group think" and are not afraid to speak out when they have disagreements or difference opinions.



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4. Be certain everyone understands why they are there—to identify 3-5 high level key initiatives the agency will accomplish over the next 2-3 years. You aren't there to create a long list of tasks to accomplish.



5. Once those 3-5 key initiatives are identified and adopted (pending board approval), you should create and assign a team to each one, making each team, and ideally one leader, responsible for further development and refinement of their initiative.

The leader and the teams' charge is to drill down into their assignment, flesh out its specifics, including scope, goals, and deadlines, etc. If this accountability is not established right away, the initiative will likely fail. Each key initiative needs a sponsor or champion to own it.



- Make it clear you will expect preliminary reports back from each team at some reasonable time frame (say, 30 days) and at some regular frequency in the future until it is accomplished.

*There are many ways to conduct a successful strategic planning session so these five steps may need adjusting to fit your specific situation. The goal is provide a solid foundation on which you can build.*

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