



A GUIDE FOR CREATING A STRONG STRATEGIC PLAN FOR YOUR ORGANIZATION or FIRM

KEYS:

1. Enhancing the Health & Resilience of your Organization
2. Shaping a Strategic Roadmap for your Organization
3. Surfacing assumptions and generating more collective perceptions of your business and its business theories.

EXPECTATIONS:

Every organization is different and seeks to provide different value through its work. You may have used very different processes, but the big questions (which you'll see in blue type in our table) are simple to list—*and challenging to answer*. You can go as deep into the list as it makes sense for your appetite, pressure, and capabilities.

Good strategic planning is a great way to learn: if you don't stretch your brain muscles, then you haven't pushed yourselves hard enough. It is also good to frame the strategic plan as a living roadmap that must be continually refined as your environment or internal context changes.

We incorporate wherever it is useful complementary exploration into the business model and marketplace dynamics for each client. I like the book *Business Model Generation* as a good tool to aid in the strategic formulation and deployment.

A GUIDE FOR BUILDING A STRATEGIC PLAN

| KEY ELEMENTS | STRATEGIC QUESTIONS |
|-------------------------------|--|
| WHO ARE WE? | <ul style="list-style-type: none"> • What is our identity, our current Mission, our current theory of change and strategic emphasis? What is our point of view and analysis of the area or region? • What is our long-term vision for our area, or constituents—what is it we’re seeking to create or leave behind? • What have we accomplished that is a promising down payment for the future we intend to create? • How strong and resilient is our business idea/model? Where do we make a unique contribution to the area? • How does our current work relate to other existing strategic efforts? • What are our current core competencies? • Who are our strongest competitors—for our constituents, volunteers, or contributors? What do they do differently or better than we do? What are the implications for US going forward? • How strong is our current financial base? What direction is it moving over the last 2-5 years (up, down, steady, fluctuating)? • How solid are our operations, technology, advisors, and partner ecosystems? |
| WHAT IS OUR SITUATION? | <ul style="list-style-type: none"> • What trends are we seeing that is affecting our area or region (national, local, institutional)? What is <i>driving</i> the key events in our current environment? How have these changed since we began and • What forces will continue into the next 5-10 years—the predetermined features of our transactional space? • Are there trends or signals of a coming “shift” that will impact our identity or business? What threats or risks should we address? • Where is the momentum that we can tap into or the emerging new opportunities? • What do our primary partners, “customers” believe is standing in the way of a good future in our area? What do they most want from US in the next five years? What are they “hiring” us to deliver for them? • What are the Big Questions we must answer to succeed in the next five years? • What is THE question we have yet to address that could determine our sustainability or impact? |
| WHERE ARE WE GOING? | <ul style="list-style-type: none"> • What/where are the best leverage points for our organization? • Given our scan of our environment, what approaches are most likely to maximize our intended social impact? • How do these reflect our vision, intent, assets, and competencies? • What is our emerging strategic or business logic for our next phase of work? • What programmatic activities at what scale (and location) will allow us to pursue the mission—or deliver the products--within our resources (the program plan)? • How do these emerging strategic actions fit together in a coherent and linked set? • Which strategic options require us to lead or to play a supporting role? • How will we engage the broader community in this work to amplify what we do? |

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| <p>WHAT WILL SUCCESS LOOK LIKE IN 2015?</p> | <ul style="list-style-type: none"> Given the emerging strategic focus, what are the priority and measureable goals? What major milestones would be required to realize our goals? What unintended consequences might we anticipate at the front end, and with what range of responses? What will we have to learn or change (<i>or even unlearn and Release</i>) as an organization to succeed? |
| <p>WHAT IS OUR BASIC ROADMAP TO THE FUTURE—HOW WILL WE GET THERE?</p> | <ul style="list-style-type: none"> Creating a 5-Year Action Timetable: Which strategies should we undertake first? Which follow in the middle, and which ones are likely to come later? How long will it take to launch, implement, refine, complete, and amplify our efforts? What will it take for the organization to coordinate this Plan of work—in staff, skill, knowledge, materials-tools-facilities, etc.? How will we work with partners at many levels to implement the Plan? What kind of essential resources will be required to support this 3-5 year effort: buildings, equipment, volunteers, income? How will we develop and generate these resources (Resource Development Plan)? |
| <p>HOW WILL WE IMPLEMENT AND ADAPT? HOW WILL WE KNOW WE HAVE ARRIVED?</p> | <ul style="list-style-type: none"> How will we shape a clear, convincing <i>story</i> about our value to the world? How will we communicate to our key stakeholders to share stories about our efforts and the effects on community or customers (the communication plan) and invite their participation and feedback? What will we need to track and measure (our evaluation or success measures/plan)? How will we learn and adapt during implementation? What other operational policies or procedures will need to be improved? What additional technology, data security, and ongoing information will we need? How do we celebrate our successes and capture our learnings? |