



## **Get Ready for Strategic Planning: A Step-by-step Checklist**

*Are you ready?* It's not rocket science, but like rockets, it works in stages to get from here to there. Your Strategic Planning Initiative is more likely to be successful if you do the following things, in order. By doing so, you will gain a clear sense of where "here" is, so you'll be ready and able to move toward "there" – your Vision.

### **1. Internal Environment: Values**

Done Not

Identify the Core Values of your organization.

These are what makes you tick. They are your operating assumptions and the principles that guide you. If you don't know what they are, you can't use them to help you attain your Vision. Furthermore, if you create a Vision incongruent with your Core Values, it'll never see the light of day.

Involve everyone in your organization.

Collaborative research yields better data. The people in the organization often have more and better information than the leaders. You won't be able to accurately discern the Core Values of the entire organization – meaning the shared values of the people in it –unless you ask.

This has the added benefit of creating a system-wide spirit of cooperation early on. It's much more productive to ask people to participate from the beginning than to try to get them to buy in during Strategic Planning.

Clearly articulate and communicate these Core Values.

Write them down, post them, share them, discuss them, use them.

### **2. Internal Environment: Mission**

Create a Mission Statement for your organization.

...or re-create it. Is the old one still applicable and serving you well? Your Mission Statement is your purpose; the fundamental reason your organization exists. If there are differing opinions about this, they will need to be resolved now if Strategic Planning is to be effective.

Done Not

Make sure everyone in your organization has a stake in the Mission.

This doesn't mean that everyone in your organization needs to be in the same room hammering out a Statement, though in some smaller organizations that may be desirable. It does mean that you'll need to be clear about how the collaboratively determined Core Values are reflected in the Mission – and Vision.

Clearly articulate and communicate the Mission.

Write it down, post it, share it, discuss it, use it. As a Leader, it is incumbent upon you to keep your people focused on the Mission and Vision of the organization.

### 3. Internal Environment: **Vision**

Create a Vision Statement for your organization.

If you don't know where you want to go, you'll never get there. Vision is a function of leadership. Strategic Planning is how you achieve the Vision.

Make sure everyone in your organization has a stake in the Vision.

Those who feel that their personal values align with the Core Values of the organization are more likely to commit to the Vision for the organization as articulated by Leadership. If you don't involve everyone in the actual crafting of the Statement – which can be OK – it's important to show how the Core Values of the organization are manifested in the Vision.

Clearly articulate and communicate the Vision.

Write it down, post it, share it, discuss it, use it. In your role as Leader, nothing is more important than staying focused on moving your organization toward attaining its Vision.

### 4. Internal Environment: **Leadership**

Be ready, willing, and able to lead the effort.

Without committed leadership from the highest levels of the organization, Strategic Planning Initiatives often fail. You can't delegate this one.

Done Not

Be willing, if necessary, to change your own beliefs and practices in order to lead your organization toward attainment of its Vision.

You may have to. It's important to acknowledge that you may be thinking and behaving in ways that are preventing you from getting where you want to be.

### 5. Internal Environment: **Culture**

Make sure the culture you've created (or inherited) is ready, willing, and able to carry the organization to its desired future.

You must have a sufficient proportion of people on board (90%+) to help you carry the effort. The work you did earlier involving everyone in identifying Core Values, and in communicating the Mission and Vision really pays off here.

### 6. Internal Environment: **Other**

Ensure adequate resources.

Be sure you can afford this, in terms of time, money, and energy.

Wrap up current and former strategies in such a way that it makes sense to do Strategic Planning now.

Don't try to do two big change initiatives or consulting projects at once.

Check the structure of the organization to ensure it can accommodate a Strategic Planning effort right now.

Major vacancies, redundancies, or holes in the Org Chart may present planning and implementation problems.

Make sure the technology you have in place will help and not hinder the process.

Other Internal factors...

## 7. External Environment: Stakeholders

Done Not

Identify key Stakeholders from each of the following areas. Solicit information from them about your current and future relationship with one another, and your mutual impact.

<input type="checkbox"/>	<input type="checkbox"/>	Legal / Regulatory
<input type="checkbox"/>	<input type="checkbox"/>	Industrial
<input type="checkbox"/>	<input type="checkbox"/>	Social
<input type="checkbox"/>	<input type="checkbox"/>	Technological
<input type="checkbox"/>	<input type="checkbox"/>	Economic
<input type="checkbox"/>	<input type="checkbox"/>	Competitive
<input type="checkbox"/>	<input type="checkbox"/>	Other

## 8. External Environment: Strategic Trend and SWOT Analyses

Identify current trends in each of the areas above.

Identify and articulate each of the specific strengths and opportunities driving the organization toward its Vision.

Identify and articulate each of the specific weaknesses and threats holding the organization back.

*Once you've done all these things, you will know everything you can possibly know about where "here" is! Successful, effective Strategic Planning becomes quick, easy, and meaningful!*

Call us if you need help.