



A GUIDE TO STRATEGIC PLANNING

A strategic plan is a common tool used by all kinds of organizations that helps them to achieve their purpose. Put simply, it is a roadmap. It sets out the destination, the pathways to get there and the goalposts that can indicate that you are staying on course. So how do you develop this plan?

This guide covers the typical key phases of the strategic planning process, discusses some of its limitations and introduces an approach that is more suitable for our increasingly unpredictable and complex world.

Before You Begin

It is important to get clarity on a few things. Consider taking the time and reflecting on the following questions:

- Why are you initiating this process?
- What do you need? What does the organization/company need?
- Is the leadership of the organization ready for the strategic planning process?
- Who will be using the strategic plan and how?
- What is your culture? What makes sense in terms of the process and the outcome?

Your honest answers to those questions will help you to make better decisions and structure the process for the best outcome: **a usable and useful roadmap for your organization!**

Typical Strategic Planning Phases

1. Initiation & Planning:

- Decide who is going to be leading the process and who is going to be helping
- Develop the process (steps, scope, timeline, etc.)
- Determine the resources needed

2. Research & Stakeholder Engagement

- Collect data and analysis of internal and external threats, opportunities, trends, patterns, etc.
- Various methods can be used: surveys, literature reviews, interviews
- Great phase to engage your stakeholders in

3. Planning Session(-s)

Establish and re-affirm mission and vision, values

- Look at the internal and external context based on the information collected
- Explore future possibilities and potential directions
- Set goals/themes/priorities/objectives and developing strategies/tactics/actions/initiatives for achieving them
- Develop the measures of success (metrics, indicators)

4. Finalization

- Clarify any outstanding issues
- Finalize the wording
- Creating the document that captures your plan
- Develop concrete steps for the implementation

Common Pitfalls & Ways to Avoid Them

1. Starting the new cycle without reviewing previous plans. Ask: Were they implemented? If not, why? What worked? What didn't?
2. A plan is created, then neglected or abandoned. Solid implementation strategy and a review schedule go a long way to keep strategic plans alive and serving their purpose!
3. The process that leaves people exhausted, overwhelmed, and demotivated or that was not accessible in the first place. Strategic thinking requires intense focus and often specialized knowledge: consider how to reduce barriers for participation in terms of time investment, duration of the sessions, the language use, preparation required, and other factors.

A typical strategic planning process typically takes months and produces a plan covering the period from 2 to 5 years. In a rapidly changing environment requiring a lot of flexibility and adaptation, this is often not useful. In fact, this is a big reason why so many plans get abandoned and the leadership ends up freestyling the response to current challenges. While this situation can open up space for innovation and creativity, over time the lack of intentional direction and alignment of various parts can have a devastating impact on the team's morale, organizational culture and the ability to deliver on the mission.



<< Here is what a more nimble strategic planning process can look like

This model accommodates a **much shorter planning and review cycle** to support adaptation and innovation.

It is **purpose-driven** and there is a larger **focus on monitoring, evaluation, and learning**, compared to traditional models.

It can be used as a **central working tool** to ensure alignment between all elements of your organization for the greatest impact.

0. Who are we?

- What is the purpose, vision and mission

1. Where are we?

- Looking back at the previous cycle
- Assessing the external and internal situation

2. Where could we go?

- Future possibilities

3. Where do we want to go?

- A shared vision of the direction (goals/themes/objectives)

4. How do we get there?

- Strategies

5. How will we know that we are getting there?

- Goalposts (metrics of success)

6. Are we getting there?

- Monitoring and evaluating the implementation

