

PREPARATION

PLANNING TO PLAN

- Assess the organization's readiness to change with leader team. Have awareness of the culture and context of the organization and mitigation to manage issues.
- Communicate to organization and stakeholders (tell them what you are going to tell them).
- Develop communication plan including cadence and methods.
- Create talking points for supervisors for each stage. Create forum for employee input and inclusion in process.
- Ensure the leaders are comfortable and understand the need for an inclusive strategic planning process and what it will mean to decision making, resources and results.
- The planning process, including leaders' roles and responsibilities, are clearly defined.
- Establish the planning structure.
- Select the planning team.
- Provide training for the planning team.
- Clearly define roles and responsibilities for the planning team.
- Develop the format for the plan.
- Communicate with the organization and stakeholders about the process—lay out the plan (tell them what you told them). Communicate, in writing, the expectations, roles and responsibilities.

ASSESSMENT

UNDERSTANDING INTERNAL AND EXTERNAL FACTORS THAT WILL INFLUENCE THE PLAN DEVELOPMENT

- Validate or Develop the Vision.
- Validate or Develop the Mission.
- Validate or Develop the Values.
- Collect internal and external information and data.
- Conduct environmental scans such as SWOT or SOAR with both stakeholders and internal employees. Ability for all employees to participate at some level.
- Analyze data, information, industry trends, demographics and other relevant information.
- Prioritize what you hear. Determine what is strategic and what is operational. Alignment is critical so that you are making strategic strides and maintaining current responsibilities.
- Communicate what the priorities are with your stakeholders and internal teams.
- Make any changes. Begin to align budgeting models and resource load.

BUILD THE PLAN

AN INTERACTIVE PROCESS

- Develop strategic goals or themes based on the information gathered in Assessment. What MUST be done?
- Develop key objectives for each of the strategic goals as well as how they will be measured. How will you know if you are successful?
- With the responsible parties, develop tactics necessary to achieve the key objectives. This includes who will be responsible for what by when.
- Validate the Goals, Objectives and Tactics with the supervisors.
- Clarify and provide training for supervisors and managers as needed. It is important to reflect on the reality of what it will take to achieve the goals. Be realistic in establishing timeliness and resources.
- Align with budgeting model. Discuss how additional work will be achieved.
- Develop how progress and results will be reported and what the frequency should be for each objective.
- Draft the plan and share with key stakeholders and internal teams.
- Finalize the plan and get official approval as necessary.
- Communicate and share the plan. Check for understanding that the strategic plan will drive priorities for decisions and resources.

IMPLEMENTATION

STRATEGIC PLANS ARE TIMEBOUND AND MUST HAVE KEY MILESTONES AND MEASUREMENTS

- Communicate the plan broadly and continue regular communication cadence.
- Responsibilities are delegated to leaders to implement and collaborate on progress, issues, and challenges. Leaders must also ensure their supervisors/managers are prepared.
- Managers and supervisors will supervise the individual performers. Support plans developed.
- Connect the tactics with individual roles and connect with performance management.
- Review progress reports locally and centrally.
- Recognize progress and attempts as well as completions of work.
- Communicate progress formally.

MEASURE AND MONITOR

REVISE. REPEAT.

- Review progress at designated intervals. Include data and progress toward objectives and goals and communicate results.
- If revisions are needed, have the planning team formally develop a revised plan, get input, finalize the plan.
- Communicate and begin the cycle over.