

6 Key Factors to Strategic Planning



Creating and updating a strategic plan is essential for mission-driven organizations to stay strong, relevant, and effective, especially in today's complex and ever-changing economic and political climate.

Whether you are establishing your vision and setting goals for the first time, or in need of a refresh, it is always a wise idea to pause and consider where you want to be in the future, and what actions you need to take to get there.

Strategic planning is about grounding your organization in its mission, vision, and values. Take the time to think through where it makes sense to focus your energy and resources to reach intended outcomes and results, and ensure all stakeholders are aligned and working toward common goals.

The steps are simple in creating change for better processes and have best practices in place for your business's future:

- 1) plan for it
- 2) invest in it
- 3) follow through on it

And when you do, be sure to incorporate these best practices into your process.

1. Create a Collaborative and Inclusive Process

Collaboration is at the center of a successful strategic [SEP] planning process. The fear of too many cooks in the kitchen is understandable but creating a strategic plan in a silo is a huge mistake. The more inclusive and collaborative your process, the more support you will have across a diverse set of stakeholders, and the more your strategic plan will accurately reflect your organization's vision for the future.

2. Operate Off Data, Not Assumptions

Everyone makes assumptions and has pre-conceived notions about their organization. However, starting the planning process without gathering data will set you up to fail. Talk to people. Host focus groups. Review the most recent facts. It's important to know where your organization is today, not where it was in the past. Using current data ensures you are solving current problems.

3. Set an Expectation for Shared Responsibility and Ownership

Oftentimes in a strategic planning process, a planning committee [SEP] is appointed without much thought about their specific responsibilities, and without clearly defined expectations for participation. However, finding the right people (think team-players) to participate on the committee, giving them an opportunity to take ownership of the process, empowering them to make decisions, encouraging them to voice their concerns, and enabling them to serve as champions for the process is vital to your success.

4. Prioritize Transparent Communication

Transparency, more than anything, builds trust. If your stakeholders are going to buy into the plan, they need to trust you and trust the process. They also need to see how their ideas and inputs are being captured and shared through regular, transparent updates and communications.

5. Think Past The Strategic Plan

The last thing you want after completing a strategic plan is to have a document that sits on the shelf and gathers dust. Because of this, it's vital to look past the planning phase and think through how you'll actually implement your plan. This includes having a clear understanding of your capacity and the resources at your disposal and determining the few priorities that will best help your organization achieve its goals. Successful strategic planning necessitates asking critical questions, making sometimes difficult decisions, and being OK with saying "no".

6. Commit To Making Changes — Especially Leadership

Change is difficult for everyone. It's especially difficult for organizations that have been doing things a certain way for a long time. However, external forces such as changing demographics and technological advances often necessitate major changes^{[1][2]} for an organization to remain relevant. To ensure your strategic plan's success, leadership needs to be willing to commit to letting go of outdated processes, rethinking their strategy, and making the changes necessary to lead your organization into the future.

An effective strategic planning process will help you create a living document that truly guides the priorities and focus month-by-month in your organization.