

How to create a profound, action-oriented strategic plan

By Carol A. Poore, Ph.D., MBA

An action-oriented strategic plan includes basic ingredients: The organization’s vision, mission, a succinct summary of external forces shaping competitive threats, an unvarnished assessment of the organization’s Strengths, Weaknesses, Opportunities and Threats (SWOT), strategic goals (most often three-year in length), and an operational action plan – 12-month annual goals.

Once your firm’s strategic plan has been shaped, your most important questions now become:

What 12-month annual goals should your organization accomplish in the NEXT 12 MONTHS?

Tip: This needs to be developed by your senior staff and brought back to the governing body. Your governing body should not be driving your firm’s organizational goals. Make your goals SMART: Specific, Measurable, Action-Oriented, Results-Oriented and Realistic, and Time-Based.



What tracking device or report should be used to capture results each month, quarterly, and at the end of a year?

There are a number of tracking tools out there – electronic and manual tools – to help you develop a dashboard so you can measure and report monthly. This dashboard becomes a rallying tool for aligning your management team and entire organization. Here’s a sample, below. Note: The simpler, the better!

Strategic Goal 3: Growth Strategies

SUPPORT FUNDING BASE

Goal 3-A By end of FY19, XXXX will successfully build new audiences, growing new and influential relationships through XXX media, marketing and outreach activities.

UR area	FY16 Initiatives	How measured										
Media/PR	<p>Find resources that better track who's reading, how reading and consuming content – more insight. More analytics.</p> <p>Media and presentation training for star faculty. Elevator speech... how to answer questions. Outsourced training.</p> <p>Faculty media experts.</p> <p>Build out information for media content on the web.</p> <p>Downtown news partnerships – ask them to share... tag</p> <p>Strategy and target audiences for tagging and metatagging...</p>	<p>Media software can help measure media exposure and certain strategies. See Resource Stewardship.</p> <table border="1"> <tr> <td>Lead</td> <td>Q1</td> <td>Q2</td> <td>Q3</td> <td>Q4</td> </tr> <tr> <td></td> <td>●</td> <td>●</td> <td>●</td> <td>●</td> </tr> </table>	Lead	Q1	Q2	Q3	Q4		●	●	●	●
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How will results be celebrated and promoted – internally to the staff, board and internal constituents, as well as promoted to the public at large?

As you achieve goals and milestones, be sure to set up celebrations with your staff, your board, as well as publish results on your digital media outlets, sharing in a timely way with your local, regional and national media as appropriate. Celebrating and honoring your firm’s milestones is not only energizing for your employees – it affirms to the external public your organization’s success, increasing shareholder (and/or) community value.

The most important aspect of an organization's strategic plan is future ACTION and RESULTS! A strategic plan can become a living, breathing roadmap – NOT a shelf ornament. And with today's digital and social media tools, you can find ways to continuously bring your strategic plan to life by promoting results!

Poore & Associates looks forward to sharing these exciting topics:

How to create a compelling story – and bring it to life.

How to hire outside expertise, while driving the planning process from the inside.

How tracking your strategic plan actually can be fun!

Taking a social approach to strategic planning.

Strategic fundraising: Outside of the box development to engage your company and your constituents.

Your investment "whys:" How to develop a compelling case for support.

Building your organization's diversified fundraising pipeline.

Stay tuned!

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