

Planning to Plan: A Customized Approach to Strategic Planning

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

Strategic planning is an important investment of executive, staff and board time.

In working with corporate, trade association and nonprofit clients to help management teams develop strategic plans, I've developed a number of trusted best practices to ensure an exceptional experience as well as final outcome – the strategic plan itself.

- 1. Plan to plan! As leader for your organization, develop goals for your planning session. This includes goals that go beyond simply creating a strategic plan.**

For example, your strategic planning goals might include:

- Bonding with your board of directors, staff and invited constituents.
- Sharpened external trend and issue awareness.
- A critical, shared examination of the organization's strengths, weaknesses, opportunities and threats (SWOT).
- A bold opportunity to create a compelling grand challenge or purpose/vision to propel your organization into the future.

- 2. Build executive team and board buy-in. Work with the appropriate leadership team or strategic planning steering committee to shape/review your agenda. This creates support and excitement for your strategic planning workshop.**

- Even if it seems that many "fingerprints are on the process," team input, even from the most skeptical members, can provide helpful insight and stronger buy-in as you conduct your strategic planning events and develop your plan and tracking system.

- 3. Develop (or invent) a customized approach that works well for the culture and time constraints of your organization.**

- If your participants struggle to get away from their work schedules, perhaps a one-day planning workshop is best. Or, perhaps a schedule of meetings – in a small series over a few weeks or months – to vet trends, external and internal analysis, and components of the plan prior to meeting for a concentrated day.
- Also, invited guest speakers or panelists need to be credible sources of insight applicable to your organization and your industry or field. It's helpful to bring in appropriate external speakers who can credibly bring fresh perspective about industry trends, contributing to an accurate environmental scan.

