

# Nine keys to successful strategic planning

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

After leading many strategic planning workshops and developing summary plans for a variety of corporate, nonprofit, trade association and higher education clients, I've developed a success formula.

If you are charged with leading your company's next strategic plan, here are nine essential ingredients to ensure your plan guides mission impact, growth and implementation. I've divided the tips into three parts.



## Part I: Executive Support and Engagement

1. Executive leadership (and board) **MUST** be committed to the strategic planning process and the plan itself – the product. The executive team must take responsibility for creating a vibrant plan vital to the success of their organization – not a shelf ornament.
2. Executive leadership (and board) must actively participate in shaping the plan, and have skin in the game when it comes to supporting the process, attending workshop(s) or summit(s), communicating the plan, and tracking progress.

## Part II: The Process (Planning to Plan)

3. A schedule, with start and end point for the planning process, should be defined and clearly understood up-front. The process must be clearly communicated, too.
4. Your process **MUST** fit your culture, time, budget and organizational dynamics.
5. The process works best when you leave room for flexibility... to adjust, revise the process as needed, especially if something is not working or you need to compress the schedule.
6. An effective facilitator makes **ALL** the difference. Someone who is well-matched to your organization's culture and is willing and able to become immersed in learning about your organization throughout the process.

## Part III: The Plan (the Product) and Successful Implementation (the Outcome)

7. The plan must triage to all levels of the organization, so that all employees can understand their contribution to the organization's success.
8. A measurement system must be developed to track progress and show results or outcomes.
  - ✓ Keep the tracking system or reporting score card as simple as possible.
  - ✓ Celebration milestones and successes – such as annually, semi-annually or even quarterly if appropriate.
9. A system for communicating the plan (a communication plan) should be developed. Ensure commitment to an ongoing progress report throughout the strategic plan's span of time (such as three years).