Strategic Planning (in nonprofit or for-profit organizations)

Written by <u>Carter McNamara</u>, <u>MBA</u>, <u>PhD</u>, <u>Authenticity Consulting</u>, <u>LLC</u>. Copyright 1997-2008. Adapted from the <u>Field Guide to Nonprofit Strategic Planning and Facilitation</u>.

Simply put, strategic planning determines where an organization is going over the next year or more, how it's going to get there and how it'll know if it got there or not. The focus of a strategic plan is usually on the entire organization, while the focus of a business plan is usually on a particular product, service or program.

There are a variety of perspectives, models and approaches used in strategic planning. The way that a strategic plan is developed depends on the nature of the organization's leadership, culture of the organization, complexity of the organization's environment, size of the organization, expertise of planners, etc. For example, there are a variety of strategic planning models, including goals-based, issues-based, organic, scenario (some would assert that scenario planning is more a technique than model), etc. Goals-based planning is probably the most common and starts with focus on the organization's mission (and vision and/or values), goals to work toward the mission, strategies to achieve the goals, and action planning (who will do what and by when). Issues-based strategic planning often starts by examining issues facing the organization, strategies to address those issues, and action plans. Organic strategic planning might start by articulating the organization's vision and values and then action plans to achieve the vision while adhering to those values. Some planners prefer a particular approach to planning, e.g., appreciative inquiry. Some plans are scoped to one year, many to three years, and some to five to ten years into the future. Some plans include only top-level information and no action plans. Some plans are five to eight pages long, while others can be considerably longer.

Quite often, an organization's strategic planners already know much of what will go into a strategic plan (this is true for business planning, too). However, development of the strategic plan greatly helps to clarify the organization's plans and ensure that key leaders are all "on the same script". Far more important than the strategic plan document, is the strategic planning process itself.

NOTE: Much of the following information is in regard to goals-based strategic planning, probably the most common form of strategic planning.

What is Strategic Planning?

Simply put, strategic planning determines where an organization is going over the next year or more and how it's going to get there. Typically, the process is organization-wide, or focused on a major function such as a division, department or other major function. (The descriptions on this page assume that strategic planning is focused on the organization.)

How to Get a Feel for Strategic Planning -- There's No Perfect Way to Do It

Planning typically includes several major activities or steps in the process. Different people often have different names for these major activities. They might even conduct them in a different order. Strategic planning often includes use of several key terms. Different people might use apply different definitions for these terms, as well.

Don't be concerned about finding the "perfect way" to conduct strategic planning. Once you start strategic planning, you'll soon find your own particular approach to carrying out the process.

One Way to Look at Strategic Planning

One interpretation of the major activities in strategic planning activities is that it includes:

1. Strategic Analysis

This activity can include conducting some sort of scan, or review, of the organization's environment (for example, of the political, social, economic and technical environment). Planners carefully consider various driving forces in the environment, for example, increasing competition, changing demographics, etc. Planners also look at the various strengths, weaknesses, opportunities and threats (an acronym for this activity is *SWOT*) regarding the organization.

(Some people take this wide look around after they've identified or updated their mission statement, vision statement, values statement, etc. These statements are briefly described below. Other people conduct the analysis before reviewing the statements.)

(Note that in the past, organizations usually referred to the phrase "*long-range planning*". More recently, planners use the phrase "strategic planning". This new phrase is meant to capture the strategic (comprehensive, thoughtful, well-placed) nature of this type of planning.)

2. Setting Strategic Direction

Planners carefully come to conclusions about what the organization must do as a result of the major issues and opportunities facing the organization. These conclusions include what overall accomplishments (or *strategic goals*) the organization should achieve, and the overall methods (or *strategies*) to achieve the accomplishments. Goals should be designed and worded as much as possible to be specific, measurable, acceptable to those working to achieve the goals, realistic, timely, extending the capabilities of those working to achieve the goals, and rewarding to them, as well. (An acronym for these criteria is "SMARTER".)

At some point in the strategic planning process (sometimes in the activity of setting the strategic direction), planners usually identify or update what might be called the strategic "philosophy". This includes identifying or updating the organization's mission, vision and/or values statements. *Mission statements* are brief written descriptions of the purpose of the organization. Mission statements vary in nature from very brief to quite comprehensive, and

including having a specific purpose statement that is part of the overall mission statement. Many people consider the values statement and vision statement to be part of the mission statement. New businesses (for-profit or nonprofit) often work with a state agency to formally register their new business, for example, as a corporation, association, etc. This registration usually includes declaring a mission statement in their charter (or constitution, articles of incorporation, etc.).

It seems that vision and values statements are increasingly used. *Vision statements* are usually a compelling description of how the organization will or should operate at some point in the future and of how customers or clients are benefiting from the organization's products and services. *Values statements* list the overall priorities in how the organization will operate. Some people focus the values statement on moral values. Moral values are values that suggest overall priorities in how people ought to act in the world, for example, integrity, honesty, respect, etc. Other people include operational values which suggest overall priorities for the organization, for example, to expand market share, increase efficiency, etc. (Some people would claim that these operational values are really strategic goals. Don't get hung up on wording for now.)

3. Action Planning

Action planning is carefully laying out how the strategic goals will be accomplished. Action planning often includes specifying **objectives**, or specific results, with each strategic goal. Therefore, reaching a strategic goal typically involves accomplishing a set of objectives along the way -- in that sense, an objective is still a goal, but on a smaller scale.

Often, each objective is associated with a *tactic*, which is one of the methods needed to reach an objective. Therefore, implementing a strategy typically involves implementing a set of tactics along the way -- in that sense, a tactic is still a strategy, but on a smaller scale.

Action planning also includes specifying *responsibilities* and *timelines* with each objective, or who needs to do what and by when. It should also include methods to *monitor* and *evaluate* the plan, which includes knowing how the organization will know who has done what and by when.

It's common to develop an *annual plan* (sometimes called the *operational plan* or *management plan*), which includes the strategic goals, strategies, objectives, responsibilities and timelines that should be done in the coming year. Often, organizations will develop plans for each major function, division department, etc., and call these *work plans*.

Usually, *budgets* are included in the strategic and annual plan, and with work plans. Budgets specify the money needed for the resources that are necessary to implement the annual plan. Budgets also depict how the money will be spent, for example, for human resources, equipment, materials, etc.

(Note there are several different kinds of budgets. Operating budgets are usually budgets associated with major activities over the coming year. Project budgets are associated with major

projects, for example, constructing a building, developing a new program or product line, etc. Cash budgets depict where cash will be spent over some near term, for example, over the next three months (this is very useful in order to know if you can afford bills that must be paid soon. Capital budgets are associated with operating some major asset, for example, a building, automobiles, furniture, computers, etc.

Basic Overview of Variety of Planning Models

Here's a quick overview of a variety of strategic planning. This overview will help you get a feel for the variety of perspectives on strategic planning.

There is no one perfect strategic planning model for each organization. Each organization ends up developing its own nature and model of strategic planning, often by selecting a model and modifying it as they go along in developing their own planning process. The following models provide a range of alternatives from which organizations might select an approach and begin to develop their own strategic planning process. Note that an organization might choose to integrate the models, e.g., using a scenario model to creatively identify strategic issues and goals, and then an issues-based model to carefully strategize to address the issues and reach the goals.

The following models include: "basic" strategic planning, issue-based (or goal-based), alignment, scenario, and organic planning.

Model One - "Basic" Strategic Planning

This very basic process is typically followed by organizations that are extremely small, busy, and have not done much strategic planning before. The process might be implemented in year one of the nonprofit to get a sense of how planning is conducted, and then embellished in later years with more planning phases and activities to ensure well-rounded direction for the nonprofit. Planning is usually carried out by top-level management. The basic strategic planning process includes:

- 1. **Identify your purpose (mission statement)** This is the statement(s) that describes why your organization exists, i.e., its basic purpose. The statement should describe what client needs are intended to be met and with what services, the type of communities are sometimes mentioned. The top-level management should develop and agree on the mission statement. The statements will change somewhat over the years.
- 2. Select the goals your organization must reach if it is to accomplish your mission Goals are general statements about what you need to accomplish to meet your purpose, or mission, and address major issues facing the organization.
- 3. Identify specific approaches or strategies that must be implemented to reach each goal The strategies are often what change the most as the organization eventually conducts more robust strategic planning, particularly by more closely examining the external and internal environments of the organization.
- 4. **Identify specific action plans to implement each strategy** These are the specific activities that each major function (for example, department, etc.) must undertake to ensure it's effectively implementing each strategy. Objectives should be clearly worded to the extent that people can assess if the objectives have been met or not. Ideally, the

- top management develops specific committees that each have a work plan, or set of objectives.
- 5. **Monitor and update the plan** Planners regularly reflect on the extent to which the goals are being met and whether action plans are being implemented. Perhaps the most important indicator of success of the organization is positive feedback from the organization's customers.

Note that organizations following this planning approach may want to further conduct step 3 above to the extent that additional goals are identified to further developing the central operations or administration of the organization, e.g., strengthen financial management.

Model Two - Issue-Based (or Goal-Based) Planning

Organizations that begin with the "basic" planning approach described above, often evolve to using this more comprehensive and more effective type of planning. The following table depicts a rather straightforward view of this type of planning process.

Summary of Issue-Based (or Goal-Based) Strategic Planning

(Note that an organization may not do all of the following activities every year.)

- 1. External/internal assessment to identify "SWOT" (Strengths and Weaknesses and Opportunities and Threats)
- 2. Strategic analysis to identify and prioritize major issues/goals
- 3. Design major strategies (or programs) to address issues/goals
- 4. Design/update vision, mission and values(some organizations may do this first in planning)
- 5. Establish action plans (objectives, resource needs, roles and responsibilities for implementation)
- 6. Record issues, goals, strategies/programs, updated mission and vision, and action plans in a Strategic Plan document, and attach SWOT, etc.
- 7. Develop the yearly Operating Plan document (from year one of the multi-year strategic plan)
- 8. Develop and authorize Budget for year one (allocation of funds needed to fund year one)
- 9. Conduct the organization's year-one operations
- 10. Monitor/review/evaluate/update Strategic Plan document

Model Three - Alignment Model

The overall purpose of the model is to ensure strong alignment among the organization's mission and its resources to effectively operate the organization. This model is useful for organizations that need to fine-tune strategies or find out why they are not working. An organization might also choose this model if it is experiencing a large number of issues around internal efficiencies. Overall steps include:

- 1. The planning group outlines the organization's mission, programs, resources, and needed support.
- 2. Identify what's working well and what needs adjustment.

- 3. Identify how these adjustments should be made.
- 4. Include the adjustments as strategies in the strategic plan.

Model Four - Scenario Planning

This approach might be used in conjunction with other models to ensure planners truly undertake strategic thinking. The model may be useful, particularly in identifying strategic issues and goals.

- 1. Select several external forces and imagine related changes which might influence the organization, e.g., change in regulations, demographic changes, etc. Scanning the newspaper for key headlines often suggests potential changes that might effect the organization.
- 2. For each change in a force, discuss three different future organizational scenarios (including best case, worst case, and OK/reasonable case) which might arise with the organization as a result of each change. Reviewing the worst-case scenario often provokes strong motivation to change the organization.
- 3. Suggest what the organization might do, or potential strategies, in each of the three scenarios to respond to each change.
- 4. Planners soon detect common considerations or strategies that must be addressed to respond to possible external changes.
- 5. Select the most likely external changes to effect the organization, e.g., over the next three to five years, and identify the most reasonable strategies the organization can undertake to respond to the change.

Model Five - "Organic" (or Self-Organizing) Planning

Traditional strategic planning processes are sometimes considered "mechanistic" or "linear," i.e., they're rather general-to-specific or cause-and-effect in nature. For example, the processes often begin by conducting a broad assessment of the external and internal environments of the organization, conducting a strategic analysis ("SWOT" analysis), narrowing down to identifying and prioritizing issues, and then developing specific strategies to address the specific issues.

Another view of planning is similar to the development of an organism, i.e., an "organic," self-organizing process. Certain cultures, e.g., Native American Indians, might prefer unfolding and naturalistic "organic" planning processes more than the traditional mechanistic, linear processes. Self-organizing requires continual reference to common values, dialoguing around these values, and continued shared reflection around the systems current processes. General steps include:

- 1. Clarify and articulate the organization's cultural values. Use dialogue and story-boarding techniques.
- 2. Articulate the group's vision for the organization. Use dialogue and story-boarding techniques.

- 3. On an ongoing basis, e.g., once every quarter, dialogue about what processes are needed to arrive at the vision and what the group is going to do now about those processes.
- 4. Continually remind yourself and others that this type of naturalistic planning is never really "over with," and that, rather, the group needs to learn to conduct its own values clarification, dialogue/reflection, and process updates.
- 5. Be very, very patient.
- 6. Focus on learning and less on method.
- 7. Ask the group to reflect on how the organization will portray its strategic plans to stakeholders, etc., who often expect the "mechanistic, linear" plan formats.

Gaining Understanding of Strategic Planning

Learning Strategic Planning

First, a Point About For-Profit and Nonprofit Strategic Planning

Major differences in how organizations carry out the *various steps and associated activities* in the strategic planning process are more a matter of the size of the organization -- *than its for-profit/nonprofit status*. Small nonprofits and small for-profits tend to conduct somewhat similar planning activities that are different from those conducted in large organizations. On the other hand, large nonprofits and large for-profits tend to conduct somewhat similar planning activities that are different from those conducted in small organizations. (The focus of the planning activities is often different between for-profits and nonprofits. Nonprofits tend to focus more on matters of board development, fundraising and volunteer management. For-profits tend to focus more on activities to maximize profit.)

Also, in addition to the size of the organization, differences in how organizations carry out the planning activities are more a matter of the nature of the participants in the organization -- than its for-profit/nonprofit status. For example, detail-oriented people may prefer a linear, top-down, general-to-specific approach to planning. On the other hand, rather artistic and highly reflective people may favor of a highly divergent and "organic" approach to planning.

Benefits of Strategic Planning

- Strategic planning serves a variety of purposes in organization, including to:
 Clearly define the purpose of the organization and to establish realistic goals and
 objectives consistent with that mission in a defined time frame within the organization's
 capacity for implementation.
- 2. Communicate those goals and objectives to the organization's constituents.
- 3. Develop a sense of ownership of the plan.
- 4. Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.
- 5. Provide a base from which progress can be measured and establish a mechanism for informed change when needed.
- 6. Bring together of everyone's best and most reasoned efforts have important value in building a consensus about where an organization is going.

Other reasons include that strategic planning:

- 1. Provides clearer focus of organization, producing more efficiency and effectiveness
- 2. Bridges staff and board of directors (in the case of corporations)
- 3. Builds strong teams in the board and the staff (in the case of corporations)
- 4. Provides the glue that keeps the board together (in the case of corporations)
- 5. Produces great satisfaction among planners around a common vision

- 6. Increases productivity from increased efficiency and effectiveness
- 7. Solves major problems

When Should Strategic Planning Be Done?

The scheduling for the strategic planning process depends on the nature and needs of the organization and its immediate external environment. For example, planning should be carried out frequently in an organization whose products and services are in an industry that is changing rapidly. In this situation, planning might be carried out once or even twice a year and done in a very comprehensive and detailed fashion (that is, with attention to mission, vision, values, environmental scan, issues, goals, strategies, objectives, responsibilities, time lines, budgets, etc). On the other hand, if the organization has been around for many years and is in a fairly stable marketplace, then planning might be carried out once a year and only certain parts of the planning process, for example, action planning (objectives, responsibilities, time lines, budgets, etc) are updated each year. Consider the following guidelines:

- 1. Strategic planning should be done when an organization is just getting started. (The strategic plan is usually part of an overall business plan, along with a marketing plan, financial plan and operational/management plan.)
- 2. Strategic planning should also be done in preparation for a new major venture, for example, developing a new department, division, major new product or line of products, etc.
- 3. Strategic planning should also be conducted at least once a year in order to be ready for the coming fiscal year (the financial management of an organization is usually based on a year-to-year, or fiscal year, basis). In this case, strategic planning should be conducted in time to identify the organizational goals to be achieved at least over the coming fiscal year, resources needed to achieve those goals, and funded needed to obtain the resources. These funds are included in budget planning for the coming fiscal year. However, not all phases of strategic planning need be fully completed each year. The full strategic planning process should be conducted at least once every three years. As noted above, these activities should be conducted every year if the organization is experiencing tremendous change.
- 4. Each year, action plans should be updated.
- 5. Note that, during implementation of the plan, the progress of the implementation should be reviewed at least on a quarterly basis by the board. Again, the frequency of review depends on the extent of the rate of change in and around the organization.

Preparation for Strategic Planning

Guidelines to Keep Perspective During Planning

Many managers spend most of their time "fighting fires" in the workplace. -- their time is spent realizing and reacting to problems. For these managers -- and probably for many of us -- it can be very difficult to stand back and take a hard look at what we want to accomplish and how we want to accomplish it. We're too buy doing what we think is making progress. However, one of the major differences between new and experienced managers is the skill to see the broad perspective, to take the long view on what we want to do and how we're going to do it. One of the best ways to develop this skill is through ongoing experience in strategic planning. The following guidelines may help you to get the most out of your strategic planning experience.

- 1. The real benefit of the strategic planning process is the process, not the plan document.
- 2. There is no "perfect" plan. There's doing your best at strategic thinking and implementation, and learning from what you're doing to enhance what you're doing the next time around.
- 3. The strategic planning process is usually not an "aha!" experience. It's like the management process itself -- it's a series of small moves that together keep the organization doing things right as it heads in the right direction.
- 4. In planning, things usually aren't as bad as you fear nor as good as you'd like.
- 5. Start simple, but start!

Need A Consultant or Facilitator to Help You With Planning?

You may want to consider using a facilitator from outside of your organization if:

- 1. Your organization has not conducted strategic planning before.
- 2. For a variety of reasons, previous strategic planning was not deemed to be successful.
- There appears to be a wide range of ideas and/or concerns among organization members about strategic planning and current organizational issues to be addressed in the plan.
- 4. There is no one in the organization whom members feel has sufficient facilitation skills.
- 5. No one in the organization feels committed to facilitating strategic planning for the organization.
- 6. Leaders believe that an inside facilitator will either inhibit participation from others or will not have the opportunity to fully participate in planning themselves.
- 7. Leaders want an objective voice, i.e., someone who is not likely to have strong predispositions about the organization's strategic issues and ideas.

Who Should Be Involved in Planning?

Strategic planning should be conducted by a planning team. Consider the following guidelines when developing the team. (Note that reference to boards of directors is in regard to organizations that are corporations.)

- 1. The chief executive and board chair should be included in the planning group, and should drive development and implementation of the plan.
- 2. Establish clear guidelines for membership, for example, those directly involved in planning, those who will provide key information to the process, those who will review the plan document, those who will authorize the document, etc.
- 3. A primary responsibility of a board of directors is strategic planning to effectively lead the organization. Therefore, insist that the board be strongly involved in planning, often including assigning a planning committee (often, the same as the executive committee).
- 4. Ask if the board membership is representative of the organization's clientele and community, and if they are not, the organization may want to involve more representation in planning. If the board chair or chief executive balks at including more of the board members in planning, then the chief executive and/or board chair needs to seriously consider how serious the organization is about strategic planning!
- 5. Always include in the group, at least one person who ultimately has authority to make strategic decisions, for example, to select which goals will be achieved and how.
- 6. Ensure that as many stakeholders as possible are involved in the planning process.
- 7. Involve at least those who are responsible for composing and implementing the plan.
- 8. Involve someone to administrate the process, including arranging meetings, helping to record key information, helping with flipcharts, monitoring status of prework, etc.
- 9. Consider having the above administrator record the major steps in the planning process to help the organization conduct its own planning when the plan is next updated.

Note the following considerations:

Different types of members may be needed more at different times in the planning process, for example, strong board involvement in determining the organization's strategic direction (mission, vision, and values), and then more staff involvement in determining the organization's strategic analysis to determine its current issues and goals, and then primarily the staff to determine the strategies needed to address the issues and meet the goals.

- 1. In general, where there's any doubt about whether a certain someone should be involved in planning, it's best to involve them. It's worse to exclude someone useful then it is to have one or two extra people in planning -- this is true in particular with organizations where board members often do not have extensive expertise about the organization and its products or services.
- 2. Therefore, an organization may be better off to involve board and staff planners as much as possible in all phases of planning. Mixing the board and staff during planning helps

board members understand the day-to-day issues of the organization, and helps the staff to understand the top-level issues of the organization.

How Many Planning Meetings Will We Need?

Number and Duration of Planning Meetings

- New planners usually want to know how many meetings will be needed and what is
 needed for each meeting, i.e., they want a procedure for strategic planning. The number
 of meetings depends on whether the organization has done planning before, how many
 strategic issues and goals the organization faces, whether the culture of the organization
 prefers short or long meetings, and how much time the organization is willing to commit
 to strategic planning.
- 2. Attempt to complete strategic planning in at most two to three months, or momentum will be lost and the planning effort may fall apart.

Scheduling of Meetings

- 1. Have each meeting at most two to three weeks apart when planning. It's too easy to lose momentum otherwise.
- 2. The most important factor in accomplishing complete attendance to planning meetings is evidence of strong support from executives. Therefore, ensure that executives a) issue clear direction that they strongly support and value the strategic planning process, and b) are visibly involved in the planning process.

An Example Planning Process and Design of Meetings

One example of a brief planning process is the following which includes four planning meetings and develops a top-level strategic plan which is later translated into a yearly operating plan by the staff:

- 1. Planning starts with a half-day or all-day board retreat and includes introductions by the board chair and/or chief executive, their explanations of the organization's benefits from strategic planning and the organization's commitment to the planning process, the facilitator's overview of the planning process, and the board chairs and/or chief executive's explanation of who will be involved in the planning process. In the retreat, the organization may then begin the next step in planning, whether this be visiting their mission, vision, values, etc. or identifying current issues and goals to which strategies will need to be developed. (Goals are often reworded issues.) Planners are asked to think about strategies before the next meeting.
- 2. The next meeting focuses on finalizing strategies to deal with each issue. Before the next meeting, a subcommittee is charged to draft the planning document, which includes updated mission, vision, and values, and also finalized strategic issues, goals, strategies. This document is distributed before the next meeting.

- 3. In the next meeting, planners exchange feedback about the content and format of the planning document. Feedback is incorporated in the document and it is distributed before the next meeting.
- 4. The next meeting does not require entire attention to the plan, e.g., the document is authorized by the board during a regular board meeting.

Note that in the above example, various subcommittees might be charged to gather additional information and distribute it before the next planning meeting.

Note, too, that the staff may take this document and establish a yearly operating plan which details what strategies will be implemented over the next year, who will do them, and by when.

No matter how serious organizations are about strategic planning, they usually have strong concerns about being able to find time to attend frequent meetings. This concern can be addressed by ensuring meetings are well managed, having short meetings as needed rather than having fewer but longer meetings, and having realistic expectations from the planning project.

How Do We Ensure Implementation of Our New Plan?

A frequent complaint about the strategic planning process is that it produces a document that ends up collecting dust on a shelf -- the organization ignores the precious information depicted in the document.

The following guidelines will help ensure that the plan is implemented.

(Note that reference to boards of directors is in regard to organizations that are corporations.

- 1. When conducting the planning process, involve the people who will be responsible for implementing the plan. Use a cross-functional team (representatives from each of the major organization's products or service) to ensure the plan is realistic and collaborative.
- 2. Ensure the plan is realistic. Continue asking planning participants "Is this realistic? Can you really do this?"
- 3. Organize the overall strategic plan into smaller action plans, often including an action plan (or work plan) for each committee on the board.
- 4. In the overall planning document, specify who is doing what and by when (action plans are often referenced in the implementation section of the overall strategic plan). Some organizations may elect to include the action plans in a separate document from the strategic plan, which would include only the mission, vision, values, key issues and goals, and strategies. This approach carries some risk that the board will lose focus on the action plans.
- 5. In an implementation section in the plan, specify and clarify the plan's implementation roles and responsibilities. Be sure to detail particularly the first 90 days of the

- implementation of the plan. Build in regular reviews of status of the implementation of the plan.
- 6. Translate the strategic plan's actions into job descriptions and personnel performance reviews.
- 7. Communicate the role of follow-ups to the plan. If people know the action plans will be regularly reviewed, implementers tend to do their jobs before they're checked on.
- 8. Be sure to document and distribute the plan, including inviting review input from all.
- 9. Be sure that one internal person has ultimate responsibility that the plan is enacted in a timely fashion.
- 10. The chief executive's support of the plan is a major driver to the plan's implementation. Integrate the plan's goals and objectives into the chief executive's performance reviews.
- 11. Place huge emphasis on feedback to the board's executive committee from the planning participants.

Consider all or some of the following to ensure the plan is implemented.

- 1. Have designated rotating "checkers" to verify, e.g., every quarter, if each implementer completed their assigned tasks.
- 2. Have pairs of people be responsible for tasks. Have each partner commit to helping the other to finish the other's tasks on time.

CONDUCTING STRATEGIC PLANNING

Strategic Analysis (Environmental Scan and SWOT)

A frequent complaint about strategic plans is that they are merely "to-do" lists of what to accomplish over the next few years. Or, others complain that strategic planning never seems to come in handy when the organization is faced with having to make a difficult, major decision. Or, others complain that strategic planning really doesn't help the organization face the future. These complaints arise because organizations fail to conduct a thorough strategic analysis as part of their strategic planning process. Instead, planners decide to plan only from what they know now. This makes the planning process much less strategic and a lot more guesswork. Strategic analysis is the heart of the strategic planning process and should not be ignored.