

PLANNING TOOL 1: 6 PLANNING STEPS

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The basic strategic planning process includes the following 6 steps:

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. Establish a vision statement - This statement describes the future state of your customers/clients and your organization at some point in the future.

3. Select the goals your organization must reach if it is to effectively work toward your mission and achieve your vision - Goals are general statements about what you need to accomplish to meet your purpose, or mission, and address major issues facing the organization.

The vision and goals might be long-range, for example, for 3-5 years into the future.

4. 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. Small organizations might not refer to strategies and, instead, go the next step about action planning for each goal.

5. Identify specific action plans to implement each strategy (or objectives to achieve each goal) - These are the specific activities or objectives that each major function (for example, department, etc.) must undertake to ensure it's effectively implementing each strategy (or achieving each goal). 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. Compile the mission, vision, strategies and action plans into a Strategic Plan document. Ensure that upper management approves the Plan.

6. Monitor implementation of the Plan and update the Plan as Needed - 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.

For more information:

McNamara, Carter. (n.d.) *Basic overview of various strategic planning models*. Retrieved from Free Management Library <http://managementhelp.org/strategicplanning/models.htm>

¹ Planning tool directly borrowed from resources at the following website <http://managementhelp.org/strategicplanning/index.htm#anchor1234>