

Strategic Planning Basic Principles

What is strategic planning?

A strategy is an overall approach and plan. It facilitates good leadership of a process.

Strategic planning takes you beyond your day-to-day activities to provide the big picture of what you are doing and where you are going.

Strategic planning gives you clarity about what you actually want to achieve and how to go about achieving it, rather than a plan of action for day-to-day operations.

A strategic plan is not rigid. It provides parameters to work within.

For the strategic plan to be successful, it must be based on:

- A real understanding of your external environment - outside factors that impact future success
- A real understanding of your internal environment - your chapter's capacity, strengths and weaknesses

Why is it important?

Strategic planning enables you to answer the following questions:

- Who are we?
- What capacity do we have/what can we do?
- What problems are we addressing?
- What difference do we want to make?
- Which critical issues must we respond to?

Only after the questions above are answered, is it possible to answer the following:

- What should our priorities be?
- Where should we allocate our resources?
- How should we organize ourselves to achieve our objective?
- Who will do what when?

Leadership Benefits

Leadership benefits of strategic planning:

- Gain insights and skills to know where your chapter stands today and where it's heading
- Learn to anticipate, initiate and manage change for maximum competitiveness
- Stay on course while constantly redefining and refocusing goals to hit a moving target
- Better understand and relate to the individuals and groups your decisions will impact

How you personally benefit by understanding the strategic thinking process:

- Inspire and direct your chapter to greater readiness and competitiveness
- Add value to your organization by understanding the need for change
- Anticipate, create and encourage change
- Establish a strategic culture
- Identify the strengths and weaknesses in your organization
- Keep your chapter moving forward
- Take risks with confidence

When should strategic planning be done? How often?

The Strategic Planning Committee

Appointing the chair of the strategic planning committee.

This individual can best lead the work of the committee if he or she has previously demonstrated a thorough knowledge of the organization and in general, has a solid understanding of organizational finances, and exhibits superb diplomatic and interpersonal skills.

Characteristics:

- Brings people together
- Fosters creative ideas
- Encourages hard work
- Creates consensus
- Creates a sense of community and common cause
- Fosters confidence

Who should be involved in a strategic planning committee?

Consider the following guidelines when developing the strategic planning committee:

1. Chapter leaders, i.e. executive board, should be included in the planning group, and should drive development and implementation of the plan.
2. Since a major focus of strategic planning will be on creating member value, committee members should have sincere interest in the organization's future success.
3. Ensure that as many stakeholders as possible are involved in the planning process. Make certain the committee is representative of the organization's membership and "customer" base. **(If the committee is not representative, it may be difficult to achieve final plan support.)**
4. There should be some members who understand the chapter's budget, with preferably at least one member able to analyze financial data.
5. Involve those who will have authority or responsibility to implement the plan. Consider a cross-functional team (representatives from each of the major chapter functional areas or services) to ensure the plan is realistic and collaborative.
6. Identify someone to administrate and record the process (arranging meetings, helping to record key information, helping with flip charts, document decisions, etc.).
7. Identify one person who ultimately has authority to make "final" strategic decisions.