

4 Steps to Planning Strategically

Step 1: Lay the Groundwork

The first step is to organize and prepare the planning process. Laying the groundwork is an important step as it provides both a framework and context for the work ahead. You need to decide *why* you are planning, *who* will participate and in what capacity, determine if you need outside help, and then clearly articulate the process and timeline so everyone is clear how the process will work. Once that is accomplished you will take stock of the past, current and future of the organization.

Step 2: Visualize the Future and Describe It

Next is the “nuts & bolts” work of strategic planning. Work in Step 1 gave some context to the organization and the world in which it operates. In Step 2, an organization develops a draft plan that describes the goals the organization intends to accomplish in the next few or more years—and how it’s going to accomplish those goals.

Step 3: Review, Refine and Commit

Once a draft plan has been developed, review it with a mix of people to get feedback and insight from a variety of perspectives. Based on the feedback and any additional input, adjust and refine the plan. The plan will be a “living” document that will change as the organization and environment changes — so don’t worry about making it perfect the first time around! You want it to reflect your goals and strategies at this point in time.

Step 4: Begin Living the Plan

Now that you have a Plan, it must be woven into your organization’s activities, work plans and budget. For the Plan to take life, everyone in the organization needs to become familiar with it and their part in making the Plan happen. Post your vision and mission statements—make them visible and well-integrated within the organization. If a ship represents your organization, your mission and vision statements are the rudder. Put it in a notebook that is clearly visible, set a regular staff and/or board meeting to review progress and celebrate successes. The hard copy of your Plan should be marked up within a couple of months!