

THE STRATEGIC PLAN PYRAMID



Discussion Guide

For The Strategic Plan Pyramid





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INTRODUCTION

Overview

The Strategic Plan Pyramid illustrates how the different functions and roles within a local government fit together to make a strategic plan successful. The Pyramid illustrates how every role within the organization is critical for strategic plan success, and the types of outcomes that should be prioritized at every level to measure progress.

This Guide provides prompts and questions that can be used to start conversations among City Managers, Elected Officials, Directors, and others within a local government about strategic planning, goals, and the roles that each group plays in successfully implementing a plan.

Purpose

The purpose of the Strategic Plan Pyramid is to illustrate the different, but equally important roles that different local government groups play in strategic planning. From elected officials, to supervisors and frontline staff, every role within an organization contributes something different to the success of a strategic plan. All roles, and all goals are connected and support strategic planning and execution.

The Pyramid is intended to clarify roles, goals, and areas of focus within a local government strategic plan by spurring conversation within and across all groups to better align focus and make even greater progress with a strategic plan. The Pyramid can also be used as a way to spot check an existing strategic plan or related implementation activities and identify areas that a local government may want to shift or better align.

Getting Started

Use this guide along with the Strategic Plan Pyramid to lead a quick, casual conversation that clarifies roles, aligns expectations, and surfaces practical next steps in your local government's strategic planning process.



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This Discussion Guide can be used with elected officials or department directors and has been developed to support a productive **15-20 minute conversation** that can be held during work sessions or leadership team meetings.

How To Use This Guide

- **Print the Strategic Plan Pyramid:** Everyone participating in the conversation should have a copy.
- **Keep it moving:** This is not a deep dive! This is a clarity check conversation. Use the discussion to identify where deeper conversation may be warranted.
- **Capture takeaways:** Identify one person who can take notes and capture questions and next steps.
- **End with 1 or 2 next steps...not 10.** This discussion may lead to a couple of next steps and that is great. If you feel like the to-do list is getting out of hand, that's a sign that you may need to remind people to "level-up" in the conversation.
- **Bring your plan:** Have your current strategic plan (or even a one-pager) available for participants to reference.

DISCUSSION GUIDE

The agenda below provides you with prompts and questions that allow the group to discuss roles, goal clarity, measures of success, misalignment, takeaways, and next steps in a structured 15 to 20 minute conversation.

Each section of the agenda has an option for a discussion with elected officials or one with the executive leadership team (department directors).

Following the sections, there are questions and ideas for next steps based upon where your local government is in the strategic planning process.



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Strategic Plan Pyramid

The Strategic Plan Pyramid shows that a strategic plan only works when **every level of the organization is aligned**. From elected officials to frontline staff, everyone plays an important role in a local government's strategic plan.

The Pyramid helps groups quickly see:

- What each level “owns” (roles)
- What each level should focus on (goals)
- How each level defines success (impacts/measures)

It is also a great “spot check” tool to see if your current strategic plan (or implementation) is set up to succeed.

Set the Tone

→ **Prompt:** We're going to use this pyramid to make sure we're aligned on what our strategic plan is trying to accomplish, who does what, and what “success” should look like at each level. The goal today is clarity and one or two next steps. We're staying high-level today so let's not get in the weeds.

→ **Warm-Up question (pick one):**

- When you look at this pyramid, what jumps out immediately?
- What part feels most clear? What part feels fuzzy?
- Where do we tend to get stuck as an organization: top, middle, or bottom?



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Walk the Pyramid

→ **Prompt:** Let's take 60 seconds and scan the pyramid from top to bottom. What should be happening at each level for the plan to actually move?

→ **Ask:**

- Where do we tend to spend most of our time?
- Where do we think we're spending time, but we're not really?
- Which level is most likely to break down under stress (budget season, turnover, etc.)?

If You're Meeting with Elected Officials

Focus: direction, outcomes, priorities, and the *why* behind the plan.

Look at the questions below and pick **3 to 5 total** to talk through with the group.

→ **Role Clarity:**

- At the top of the pyramid, what is the governing body responsible for protecting or advancing?
- Where does your role stop and the staff's role begin?

→ **Goal Clarity:**

- If we had to describe our strategic plan in one sentence, what would it be?
- What are the two or three outcomes we most want residents to feel/see in the next 12 to 24 months?

→ **Measures of Success:**

- How will we know this plan is working? What would you expect to see change?
- What are the 1 to 2 "proof points" you want to see in updates to know we're getting there?

→ **Common Misalignment Check:**



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- Where do we accidentally drift into the middle/lower levels (tactics, action plans, operations, etc.)? Why?
- Where do we need more clarity so we're not solving the wrong problem?

If You're Meeting with Department Directors

Focus: translating priorities into execution without losing the plot.

Look at the questions below and pick **3 to 5 total** to talk through with the group.

→ **Role Clarity:**

- Where do directors add the most value in the pyramid? Alignment, resourcing, removing barriers, accountability?
- Where do we unintentionally create confusion for staff about what matters most?

→ **Goal Clarity:**

- Which strategic priorities require cross-department ownership (not silos)?
- What are we currently doing that *looks* strategic but isn't actually connected to the plan?

→ **Measures of Success:**

- What is one measure we could track that would tell us we're making progress without getting too complicated?
- Where are measuring activity (outputs) instead of impact (outcomes)?

→ **Execution Check:**

- If a frontline employee were asked, "How does your work connect to the plan?", would they have an answer?
- Where is the handoff breaking: priorities → departmental goals → tasks?



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Pick the Takeaway (Make it Real)

- **Prompt:** Based on the pyramid, what's the *one* thing we should tighten up to make the plan easier to execute?

Pick one of the options below:

- **Option A: The Most Important Shift**
 - What's one shift we need to make: more clarity, more focus, better measures, cleaner roles, or stronger follow-through?
- **Option B: The Missing Level**
 - Which level of the pyramid is currently the weakest link for us, and why?
- **Option C: The Stop | Start | Continue (Fast Version)**
 - Stop: What is one thing we should stop doing because it is not aligned?
 - Start: What is one thing we should start doing to support our strategic plan?
 - Continue: What is working that we need to make sure we keep doing?

Next Steps

End with 1 to 2 next steps. Not a laundry list. Think small, specific, and doable.

- **Choose from these prompts:**
 - What is one decision or clarification we need to make to support our plan?
 - What is one way we will keep the plan "alive" over the next 30 days?
 - What is the simplest way to communicate our plan priorities to staff so it sticks?
 - What is one thing we should review or tighten before the next planning cycle?



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→ **Close with commitments:**

- Who owns the next step?
- What does “done” look like?
- When will we revisit this (two weeks, 30 days, etc.)?

Situation Specific Questions

This is Your First Strategic Plan

→ **Consider Asking:**

- What problem are we trying to solve by doing a strategic plan? (focus, trust, alignment, accountability, community outcomes, etc.)
- What would make this effort worth the time and energy?
- What do we need to decide before we start? (scope, timeframe, involvement, decision-making, success measures, etc.)

Next Step Ideas: define 3 to 5 outcomes you want; confirm roles for the planning process; set a simple cadence for updates.

New Elected Officials or Recent Turnover

→ **Consider Asking:**

- What parts of the plan feel unfamiliar or unclear to newer leaders?
- What do we need to re-clarify about roles so we stay out of the weeds, but still stay accountable?
- What does a “good update” look like for this group?



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Next Step Ideas: align top outcomes; agree on what updates should include; clarify how priorities get adjusted.

Employee Engagement

→ **Consider Asking:**

- Where does the pyramid break down for staff? Understanding, relevance, language, or follow-through?
- What is one way we can help employees see themselves in the plan?
- What recognition or feedback loop would make this feel real?

Next Step Ideas: translate priorities into department-level contributions; create a simple “line of sight” message to staff; develop a strategic plan one-pager.

Renewed Focus on Existing Plan

→ **Ask:**

- Which priorities are still valid, and which might need a refresh?
- What are we overcommitted to right now?
- What is one priority we should double down on for the next 90 days?

Next Step Ideas: refresh measures; reset 90-day focus; simplify reporting.



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Upcoming Strategic Planning Process

→ Ask:

- What do we want to protect from past planning efforts?
- What do we want to do differently this time so it gets implemented?
- What must be true on day one for implementation to really work (ownership, cadence, capacity, etc.)?

Next Step Ideas: role clarity in planning process, readiness check, decide how you want to track and report progress.

CONCLUSION

The Strategic Plan Pyramid is a simple tool. But it has a way of bringing the bigger stuff to the surface fast. Role clarity, where focus is drifting, and what success should really look like at each level can all be highlighted by using the Pyramid as a way to have a quick, but meaningful conversation. If the conversation you just had created some energy (or exposed some fuzzy spots), that is a win! The goal isn't to solve everything in one meeting. In fact, the goal is to be having the conversation at all. Leaving with clearer alignment and one or two small, specific next steps to keep the strategic plan alive is an even bigger win.

If the discussion made you want to dig deeper into role clarity and building some strategic planning muscle in your organization, you might consider:

- **[The Mayor & Board Chair Guide to Strategic Planning](#):** A guide written just for mayors and board chairs that describes their specific role in strategic planning and implementation, what they can do to ensure success, and how to keep their colleagues and community engaged. This guide is a great way to introduce new Mayors to their role as a strategic leader or give tenured Mayors a renewed focus on the strategic plan.



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- **Local Government Guide to Strategic Planning:** A guide that expands upon the Mayor & Board Chair Guide and includes: discussion of the strategic plan and its connection to other government plans and funding sources; common challenges key areas for successful implementation; and role descriptions and “what to do now” actions for every level in local government. If you want everyone in the organization on the same page and focused on the right things, this is the guide you need.
- **Elected Official Orientation Session:** A 90-minute facilitated training session on the importance of strategic planning, the Strategic Plan Pyramid, the roles and responsibilities of elected officials in planning and implementation, and the top ten do’s and don’ts for successful strategic planning. Easily held during a work session, this training is perfect for getting both newly elected and experienced officials engaged, excited, and on the same page about strategic planning.
- **Strategic Planning Orientation & Readiness Assessment:** An expanded version of the Elected Official Orientation Session that offers organization-wide preparation for strategic planning or implementation. Role-based or department-specific training(s) that expands beyond the role of elected officials and gives deeper insight into all levels of the Pyramid. Included is a review of existing or previous plans, Stratalysts’ role-based Readiness Assessment, organization and department-level recommendations, and Do’s and Don’ts aligned for roles and departments. This in-depth orientation and evaluation is the due diligence that makes the difference between a successful strategic plan and a plan that sits on a shelf, gathering dust and wasting resources.

Not sure what your next steps might be? Have questions on roles or something else that came up during the discussion? I’m happy to help. Reach out, let’s chat!

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