

Deliverables of Metrics-Based Strategic Planning

Pre-Planning & Information Gathering

- Organizational Objectives Determined
- Stakeholders & Participants Identified
- Pre-Planning Internal & External Data Gathering

Strategic Planning Facilitation

- Clarify Mission
- Create Vision
- Establish Value Statements
- Identify 3-5 Strategic Priorities (Game-Changers)
- Select Key Action Items
- Develop Key Performance Indicators (KPIs)

Strategic Plan Development

- Document Strategic Priorities, Action Items, Ownership,
 Resource/Budget Allocation & Timeline
- Develop a System for Tracking Key Performance Indicators (KPIs)
- Establish Accountability Plan

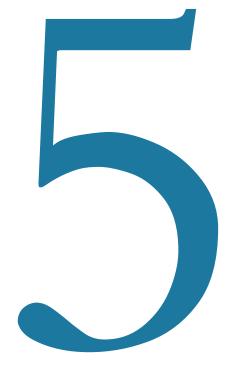
Strategic Planning Implementation

- Communicate Plan to Key Stakeholders
- Build Departmental Operational Plans in Conjunction with Strategic Priorities
- Establish Consistent Strategy/Progress Sessions
- Communicate Progress Often to Key Stakeholders
- Establish Annual Strategic Reviews

Strategic Planning Evaluation

- Evaluate Areas Where Additional Support is Needed:
 - People
 - Resources
 - Structure
 - Systems
 - Culture





Common Terms in Strategic Planning

MISSION

- ·Explain why an organization or group exists
- ·Describes purpose
- ·Practical
- ·Describes benefits to its clients/customers
- ·Describes benefits to stakeholders

VISION

- ·Shows what the organization wants to become
- ·Describes the potential of the organization or its clients/customers
- ·Inspirational
- ·You have control over or greatly can influence vision achievement
- ·"Super Goal"

The **VALUES** statement lists the core principles that guide the culture through attitudes, actions and decision-making.

EXAMPLE:

We are $\boldsymbol{ACCOUNTABLE}$ to ourselves and those we serve.

We are **COMPASSIONATE** in all we do.

We strive to "MAKE A DIFFERENCE".

SWOT (Strengths, Weaknesses, Opportunities & Threats) provides insight into an organization's internal environment identifying its strengths and weaknesses and offers perspectives into the external environment and potential opportunities and threats.

A **PESTLE** analysis seeks feedback as it pertains to political, economic, social, technological, legal and environmental.

SCORECARD - measures the key elements needed to accomplish the goals of the strategic plan.

OKRs (Objective & Key Results) - big-picture goals and targets that are designed to push organizations forward.

- EXAMPLE:
 - o Objective Increase revenue by 30%
 - Key Result Acquire 40 new customers

KPIs (Key Performance Indicators) - evaluate performance over time

• EXAMPLE: Annual Net Profit Margin

