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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

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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 **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:

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

KPIs (Key Performance Indicators) - evaluate performance over time

- EXAMPLE: Annual Net Profit Margin