**Awesome Tips for Strategic Planning – Get Real Results**

**Don’t be a statistic!!**

* **Make strategy a habit.** The absolute key to a successful plan. Make strategic planning a part of your culture, because culture eats vision for lunch. No one has ever had long term success without a plan that is constantly reviewed, updated, celebrated and talked about. Habits are built over time – start early and practice often!
* **Have a mission, vision, and values already completed.** Or, make sure you cover these foundational ideas as a part of your strategic plan. Without a vision, core issues can’t be identified. Without core issues, the goals, strategies and projects won’t meet the needs of the organization. With a project that meets your goals and strategies, your action steps won’t make any sense!
* **Understand why strategic plans fail.** Over 70% of strategic plans are never implemented. Know the shortcomings in your own agency (lack of resources, commitment, or focus are the most common) and make sure your plan takes that into account.
* **Know the difference between strategy and tactics.** This is a tough one, but think of it like this: your strategy is an iceberg and the very tip, visible from above, are your tactics. Strategy is long term, tactics are short term.
* **Put strategy first, reality second.** If you start off thinking, “We don’t have the budget”, or “Our staff isn’t robust enough to implement”, or “The public will never support a crazy idea!” your plan will fail before it is written. Instead, use your mission/vision/values to drive your big scary goals….and then get some projects. Once there, do your reality check: what do we need to accomplish this project?
* **Regularly exercise your strategic planning muscles.** I recommended a review of your plan every 90 days (once a quarter at least). That keeps focus and accountability foremost, because a report for the team will be due on your actions steps! A quarterly review guarantees forward momentum and success stories that can be shared with the whole organization.
* **Realize that the first idea is not always the best idea.** Strategic planning is hard. Really hard. Sometimes, especially after a long day of strategy, it seems easier to just take the first good idea the team generates. In one work: DON’T. Make sure you
* **Follow the process.** Don’t skip any steps! Usually someone in the team thinks part of the process is ridiculous, or time consuming, or not moving the plan forward. Trust your facilitator! These are time proven success steps in a bigger process that will be CRITICAL to your success. If you skip a step, or are lackadaisical about the work, the end result will suffer.
* **Share ideas.** Brainstorm. Use examples from other agencies. Share what has worked and what hasn’t worked in the past. Don’t be afraid to use best practices in your implementation plan.
* **Ask questions.** Two parts here: First, ensure your team is encouraged to and rewarded for asking the hard questions. Without rigorous thought your plan will fail. Second, ask the Four Big Questions and the Three Key
* **Make sure your team is built with thought and purpose.** Build your team with different thinking preferences, from different levels of your organization, and with different perspectives and approaches. Nothing hard was ever accomplished by a group of people that always agree!
* **Have a champion for your strategic plan.** Having a champion, hopefully at the very top of your organization, will create seriously positive benefits: support for your team, inspiration to continue, resources and money for your projects, and implementation of the plan. Keep your champion in the loop and make sure they hear about your successes and your lessons learned.
* **Allow enough time.** Tocreate a strategic plan, your team needs time to think strategically. Almost always this means taking your team off site (even a very short distance away). Plan on bringing in lunch. Generally the first session will take two full days (6 hours each) and the 90 day reviews will take 4 – 6 hours. In between your action teams will need to meet to talk and complete their deliverables.
* **Gain tocus and commitment from the very top levels.** If you team is cross agency and cross functional, sometimes their supervisors and leaders will be concerned about the amount of time it takes to do strategic planning. So make sure those leaders and managers know about the process, support the process, and are part of your team for that purpose. Involve and educate them to the best of your ability.
* **Make sure you (personally) can participate.**  Don’t lead the planning sessions. Hire an outside facilitator, someone who doesn’t have any stake in your success, which can free up the conversation.
* **Use a facilitator.** Hire a trained professional who has no emotional investment in the outcome of the plan (but you want one who can invest in you!) An impartial third party can concentrate on the process instead of the end result and can ask the tough questions that others may fear to ask. They will also have a perspective (hopefully from experience in your organization’s work, or from interviews before starting the process) that will be different and valuable to the process.
* **Make your plan actionable and measurable.** Our process includes a table that links your core issues to goals, then to the strategy, then your project. Why? So that the action step you list next is TIED to all of those steps. The action step (deliverable) has a deadline, a team leader and team members. At your 90 day review that team will report out on their successes!
* **Have a one page plan printed out for everyone in the organization.** Nothing will work better to promote your plan than sharing it. But who wants to read a 30 page document? No one, that‘s who. So have your facilitator create a one page plan that will graphically illustrate your strategic plan. It should have your mission/vision/values as well as your core issues. Then the goals/projects/strategies and finally the table of action deliverables.
* **Plan to be flexible with your plan.** Things change. Leadership changes. The economy changes. Budgets change. Don’t be afraid to change your plan as necessary. If you are reviewing your plan every 90 days, that should allow for the nimble changes in course that keep your plan flexible and adaptable to meet the true needs of your company.
* **Have someone taking notes (and not one of your core team members).** It’s crucial to have a note taker (not you, not a team member and not the facilitator). The focus of your note taker is to capture the ideas and thoughts as well as the outcomes. Those notes become an historical record for your team.
* **Follow up in writing.** Send out the notes within one week, and the one page plan at the same time.
* **Keep your plan relevant and important…and always updated.**  Review the strategic plan for performance achievement no less than quarterly and as often as monthly or weekly. Focus on accountability for results and have clear and compelling consequences for unapproved missed deadlines.
* **Celebrate your successes.** Every 90 days you will have progress towards your big scary goals…..so celebrate that progress! Each action step completed means you are that much closer to the vision.
* **Learn from your lessons.** What if you didn’t have successes? Well, you certainly should have some lessons learned! It’s just as important to learn from what happened (good and bad) over the last 90 days as it is to look to the future.
* **Identify trends and current issues.** At each review meeting, step back and take a hard look at any issues that came up during the action team meetings. Those issues may mean you need to adapt and be flexible for the next 90 days. Trends become evident as the team moves through the process.
* **Reality check – but only AFTER your big goals and strategies are identified.** After you have your goals/projects/strategies (**GPS)** completed. It’s time for a little reality check. What policies need to be created, followed, or adapted? Do you need additional funding or staffing? What might stand in your way? Call it a SWOT, but make sure you don’t skip this step!
* **Don’t reinvent the wheel.** Although you can’t borrow someone else’s strategy (if only we could….), you can find great ideas, best practices, and use examples of what’s worked. When your team is stuck on vision, look up other vision statements. It’s a great way to start the brainstorming conversation and get your team back on track.