

STRATEGIC PLANNING PROCESS CHECKLIST

- 1 Get Ready & Organized:** Identify specific issues and choices the process should address.
 - Determine organizational readiness
 - Create the planning committee
 - Identify the information which must be collected to help make sound decisions.
- 2 Articulate the Mission and Vision:** Owners/manage clarify why the organization exists and what the end game is.
 - Determine its primary business and organizational purpose
 - Identify the corporate values
 - Create an image of what success would look like
- 3 Review Strategic Position:** Gather up to date information to develop an understanding of the critical issues.
 - Information should include:
 - Internal strengths and weaknesses
 - External opportunities and threats through a competitive analysis
 - Market opportunities through customer surveys
 - Synthesize into a SWOT (situational analysis)
- 4 Agree on Priorities:** Identify the broad approaches for addressing critical issues
 - Solidify the organization's competitive advantage
 - Determine long-term goals/objectives
 - Select strategies for customer segments
 - Establish SMART short-term goals/objectives and the results to achieved
 - Draft this year's action items
- 5 Organize the Plan:** Put the pieces together into one coherent document with the following reports:
 - Complete Strategic Plan – for reference
 - One-Page Strategic Plan – for communicating
- 6 Roll-Out the Plan:** Communicate the plan across the organization:
 - Everyone in the organization has received a copy of the plan in some form (printed, emailed, posted on a wall in the break room)
 - Identify the strategic plan leader
 - Provide budgetary and resource support
- 7 Identify Next Actions:** Make the plan tangible to each member of the team by clearly identifying what he/she is responsible for:
 - Scorecard – for measuring
 - Action Sheets – for executing
- 8 Hold Everyone Accountable:** Monitor your plan by reporting performance metrics on a monthly or quarterly basis.
 - Identify the source of each metric associated with measurable goals
 - Set up systematic process for monthly or quarterly reporting
 - Communicate to each responsible person when and how to report on their goals
 - Hold monthly or quarterly strategy meetings
 - Regularly monitor, evaluate, and adapt