OnStrategy

Best Strategic Planning Software Review for 2024

In this guide we will cover:

- ♦ **How do you know if you need strategic planning software?**
- ♦ **How to choose the best strategic planning software**
- ♦ **OnStrategy vs Excel**
- ♦ **OnStrategy vs. Smartsheet**
- ♦ **OnStrategy vs. Cascade**
- ♦ **OnStrategy vs. ClearPoint**
- ♦ **OnStrategy vs. AchieveIt**
- ♦ **OnStrategy vs. Profit.co**

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How to Begin Choosing Strategic Planning Software

[Strategic planning](#) is an essential aspect of business growth and success, and the process has a higher success rate when it's backed by a purpose-built application. Choosing the best strategic planning software just became more important than *ever*.

As strategic planning and methodologies become more and more popular, organizations and businesses are finding new ways they can implement the process on their own. The best way is through online, full-service software solutions that allow you to DIY the process yourself.

But in a sea of choices, how are you supposed to decide which is the best strategic planning software for your organization?

With a growing demand in strategic planning software comes decision paralysis. There are so many applications to choose from, and each is equally as unique as the next! How do you even begin to determine which is the best strategic planning software for your business or organization? What attributes make up a strategic planning application that is right for you?

At OnStrategy, we are partial to our own application. We'd love to be your software vendor, but we wouldn't be doing our due diligence if we didn't provide advice and guidance on how to determine if you need a strategic planning software, what to look for when choosing the right strategic planning software to meet your business needs, and how our approach to strategic planning is different than our competitors.

We want you to select our application as your preferred strategic planning facilitation software solution because you know we're the best and most comprehensive choice in the market. Read on for tips and advice on what to look for as you compare strategic planning software and see how OnStrategy stacks up against other leading strategic planning solutions in the industry.

A Brief Summary of Strategic Planning

Strategic planning looks at three primary components:

1. **Where are we now?**
2. **Where are we going in the future?**
3. **How will we get there?**

It is ultimately the process that allows your organization's current state to move forward into your idealized future state by helping you reach your big, bold vision. We have countless resources and informational articles to help you further educate yourself on the basics, like this article that breaks down how to write a strategic plan.

Many strategic plans look at elements such as mission statements, core values, vision statements, as well as the standard business elements like competitive advantages, strategic objectives, SMART goals, etc. and a good **strategic planning** software tool should include space for all of these strategic planning features.

Watch the Video Here!

How Do You Know if You Need Strategic Planning Software?

Before deciding which application is the best for you, step back and ensure you need this software. You know you need an application when you can check off each of the following criteria:

You have at least 10+ people in your organization ready to implement a strategic planning process.

Strategic planning can be a heavy process to undertake. While strategic planning software tools make the process easier, if you have less than 10 people supporting your process [or in your entire organization], you might not see the benefit of implementing a dedicated tool to manage strategy.

Often, these software solutions can be expensive, so without a large and dedicated team to make it worth it, teams with less than 10 contributors could use a free tool like Smartsheet or Excel to manage their process.

You are a committed CEO or have a committed CEO for the strategy execution cycle.

From our experience, having CEO buy-in is critical for success in strategic planning. CEO buy-in is imperative, not only from a motivational standpoint but also from a logistic and facilitation standpoint. Without your leadership on board with the process, the decisions your team can make on behalf of the strategic plan are ultimately limited.

Your organization is committed to the strategy execution cycle.

Success with strategic planning requires a commitment to managing the entire process. While strategic planning itself may be a 3-month process, the implementation aspect is ongoing. Check-ins are required at least quarterly, and recalibration should be done yearly. Without that commitment, it's an uphill battle to make this process work.

You need reliable strategy reports.

Reporting is the most critical feature of any leading software solution for strategic planning. Although you could easily utilize any Microsoft Office or Google Suite program to create a report, the primary benefit of using a strategic planning tool is that all the data lives in a dashboard, and some of the best programs have the capability to easily download the provided data into a succinct report. No need for extra work!

Check out our [Strategic Planning Course](#) to guide you through each step of the strategic planning process.

How to Compare Strategic Planning Software

Now that you've determined you need strategy planning software, the fun begins! As you compare different offerings and options on the market, we consider these factors critical during any strategic planning tool evaluation:

✓ Strategic planning apps should support strategy out of the box.

An app should be purpose-built for creating and managing business strategy. The best apps build strategy right out of the box. If your selected strategy app needs endless customization and set-up, proceed with caution.

A good app makes it easy to input the foundations of your mission, vision, and values, set up competitive advantage analyses, and provide OKR and KPI tracking, as well as integrations to allow for alignment with your team. This allows your organization to align your goals to your organizational direction, provide guided inputs, and create OKRs based on best practices.

✓ Your organization can self-report progress from anywhere.

Self-reporting isn't just a nice-to-have. It's mandatory! Your organization needs to be able to report results from anywhere.

One of the most significant pain points software applications solve is collecting results reporting. A good app makes it easy for your team to update their progress, select status, and see what needs their attention. It needs to be fast, efficient, and painless to update your goals and KPIs.

✓ Alerts and notifications are a must-have.

Everyone needs reminders from time to time. Your strategy app should have built-in notifications and reminders to nudge your team when it's time to provide a progress check-in.

✓ Data should be easily managed, dynamic, and visualized in dashboards.

Strategy and OKR data need visualization to make it easier to see what is helping or hindering your performance as an organization. A good strategy application visualizes this data and makes it easy to digest.

✓ Reports should be automated and effortless.

To drive your daily, weekly, monthly, and quarterly strategic implementation process, you need an application that provides a suite of reports to help you drive your 1:1s and strategic performance reviews. They should be easy to access and take no input time to create. All of the data and results from your app should be present.

A good application includes board reporting capabilities to easily share your strategic priorities and performance to build a culture of transparency.

✓ Bonus: An App that includes dedicated strategic planning experts.

Apps accomplish and automate a lot of the strategy development and execution cycle, but what happens when you or your team get stuck? Apps don't build strategy. People do. And you should have access to a person that can help. A good strategic planning app should have dedicated experts available to help you through the planning and implementation process.

*Bonus: A great strategic planning software solution also provides users with robust and diverse training courses and help sections for self-support.

Best Strategic Planning Software Comparisons

OnStrategy

Best for small and mid-sized teams who want to build their plan with guided exercises and courses, have a purpose-built tool for implementation, and can access experts when they need it.
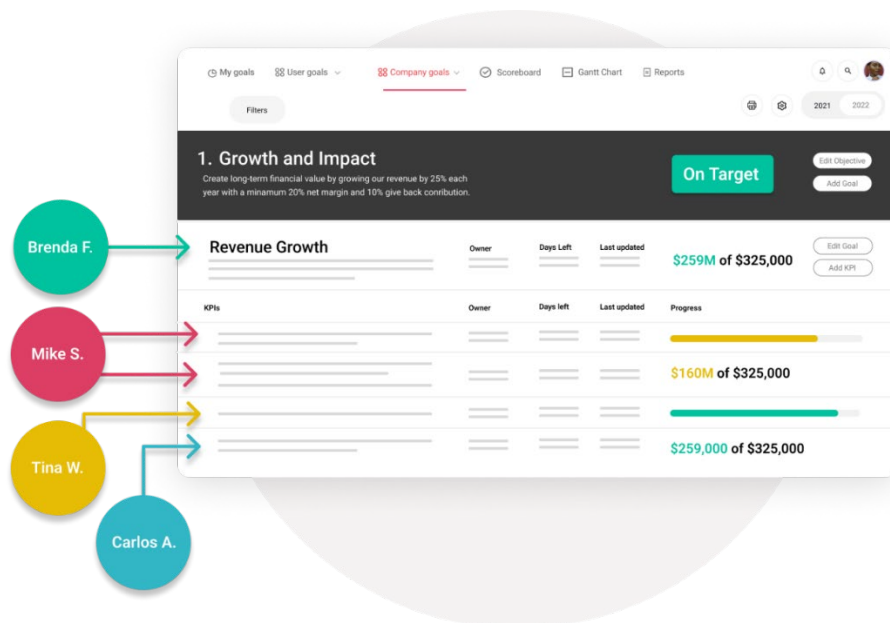
OnStrategy is a strategic planning software and services company that promises to help you and your organization achieve 80% of your goals — consistently. We built our **strategic planning software solution** to be the best for aligning your strategic vision with your team's daily activities.

OKRs are one piece of the puzzle that fits together with your overall strategic plan, so in addition to all the other aspects of strategy, we've included a comprehensive and dedicated OKR reporting section in our program as well. Most software solutions on the market either focus on strategy or OKRs. We are the only software solution that uniquely integrates both.

OnStrategy is one of the few truly well-rounded software and services solutions on the market. We understand you can't do strategy alone, so we also offer coaching and facilitation services. Schedule a **discovery call** with one of our leading experts today!

Bonus: Our strategic planning software integrates with Miro for collaboration, Microsoft Teams, and Slack. We also have self-guided modules to help you and your team navigate your strategic planning process.

Key features:

♦ **StrategyHub courses** that guide you through your strategic planning process—starting from setting your mission, vision, and values all the way to quarterly implementation of OKRs.

♦ A **community of practice** that meets bi-weekly so all our StrategyHub customers can meet with real-world experts and collaborate.

♦ A software that supports your planning framework, including balanced scorecards and OKRs.

♦ OKR methodology that supports monthly reviews and quarterly refreshes of your organization's OKRs.

♦ Downloadable reports and strategic plans that are customizable and easily shared with your board members or stakeholders.

♦ Countless options for **collaboration,** including multiple users and teams, a dedicated and integrated Miro board and other OKR tools to build your plan, and an included Microsoft Teams and Slack integration.

♦ Dedicated strategy **experts** to assist you with your plan (for an additional fee).

♦ Automated **reporting** and notification system.

♦ Manual and systemized data collection like key performance indicators to track the progress of your goals.

Microsoft Excel

Best for organizations with limited budgets and less than two people managing the process.

Excel is a powerful tool that allows you to track data and see key metrics, through spreadsheets and data visualization. You can easily set it up for your competitive advantage and SWOT analysis among other analytic tools you may need.

However, to make your strategic plan fully comprehensive, you would have to pair it with a tool that supports vision and mission statement creation or a combination of programs. This is time consuming and allows no opportunity for automation.

Pros:

♦ **Infinitely customizable.**
♦ **Included in most core office applications. No free trial is necessary.**
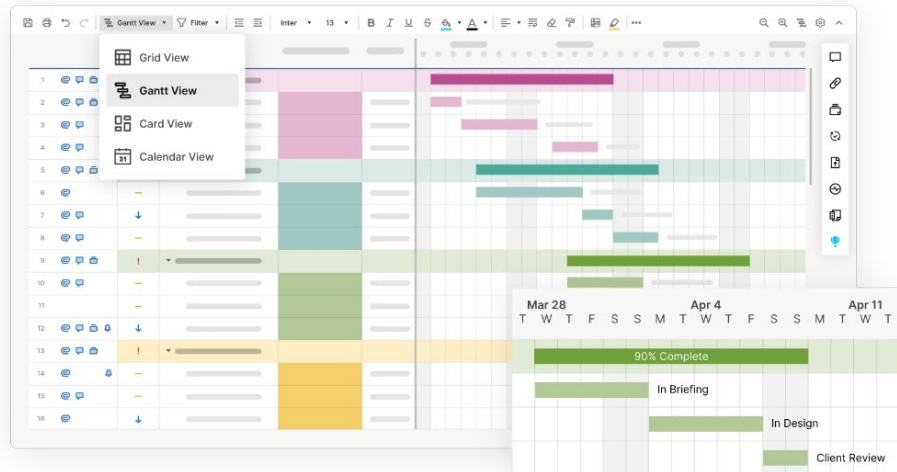♦ **Inexpensive/Free.**

Cons:

♦ **Extremely challenging to set up.**
♦ **Not purpose-built for strategy or OKRs.**
♦ **No alerts or reminders.**
♦ **No visualizations or automated reports.**
♦ **No strategy expertise or support.**

Why OnStrategy is Better:

We built OnStrategy because managing strategy in Excel was a headache. Our app was purpose-built to support the strategy execution cycle process and solve the pain points of managing OKRs in static spreadsheets and finding other tools to support all aspects of strategic planning.

Smartsheet

Best for small organizations with five or less contributors and limited budgets.

Smartsheet is a very affordable project management and strategic transformation software that is also incredibly versatile. It has dashboards and templates for resource management, portfolio management and other options.

It allows users to share key information to stakeholders and keep them informed by providing real-time visibility into project statuses and performance.

Pros:

♦ Easy templates to follow.
♦ Infinitely customizable.
♦ Inexpensive.

Cons:

♦ Challenging to set up.
♦ Not purpose-built for strategy or OKRs.
♦ No alerts or reminders.
♦ No strategic planning expertise or support available.

Why OnStrategy is Better

OnStrategy is purpose-built for strategy and OKRs, automates reporting, makes it easy for your team to update their results, and we are here to support your entire process. Smartsheet is a great tool, but it's primarily a fancy spreadsheet.

Cascade

Best for enterprise or large organizations that need a dedicated strategic planning tool.
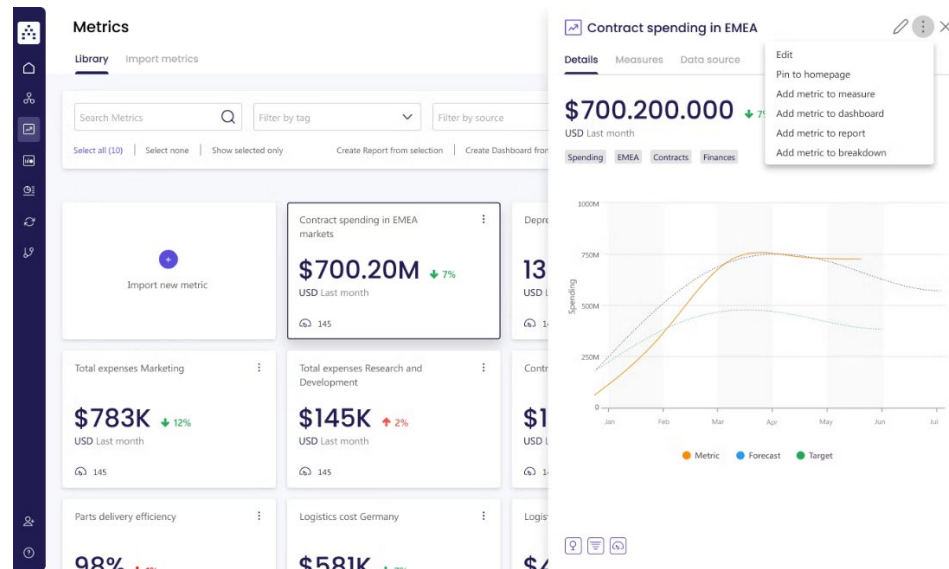
Cascade is an all-in-one strategy execution platform that boasts OKR and KPI capabilities that allow you to track and measure success, as well as dashboards and reports that help you visualize your strategy and generate dynamic business reports. Cascade can house your entire strategic plan in one place— without the need for spreadsheets and slide decks.

Pros:

- ♦ **Easy to use and set up.**
- ♦ **Free plan for small teams.**
- ♦ **Purpose-built for strategy and data management.**
- ♦ **Automated reporting and visualization.**
- ♦ **Man pre-built integrations connect your data.**

Cons:

- ♦ **Tech support only**– no real planning expertise behind the app.
- ♦ **Entire feature set costs extra.**
- ♦ **Built by engineers, not strategy experts.**
- ♦ **Doesn't guide you to create organizational strategy. Only guides you to create goals and actions.**

Why OnStrategy is Better:

OnStrategy helps organizations build an entire plan from start to finish with guided exercises, whiteboards, and interactive tools. Plus, get access to experts at any point when you need help finishing your strategic plan.

ClearPoint

Best for organizations who want an infinitely customizable strategic planning software and don't mind the heavy time investment to set it up.
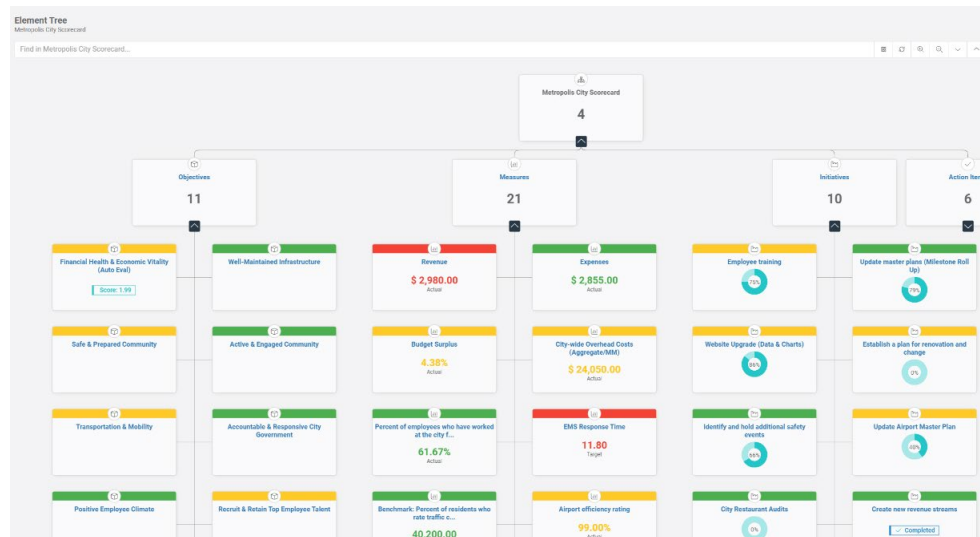
ClearPoint Strategy is a SaaS strategy reporting tool used by businesses and organizations to automate and streamline their strategy reporting process. They steamline processes such as business performance management, OKR metrics, and other data reporting. ClearPoint's integration and automation makes it faster and easier to report on strategic planning execution.

Pros:

- ◆ **Purpose-built for strategy and data management.**
- ◆ **Very customizable reporting and dashboards.**
- ◆ **Option for onboarding support.**
- ◆

Cons:

- ◆ **Very heavy to set up and use.**
- ◆ **No expertise is available to help build or roll out your plan.**
- ◆ **Does not include a self-service DIY course to train users how to create their strategy.**

Why OnStrategy is Better:

OnStrategy's guided planning and pre-built dashboards, reports, and data management make building and setting up your plan easy. We also include <u>all</u> elements of strategic planning— from OKR management, to mission, vision, and values creation, as well as competitive advantage and other business analytics.

AchieveIt

Best for executive management, C-suite, and managers of midsize to large companies that need software for strategy execution and management.
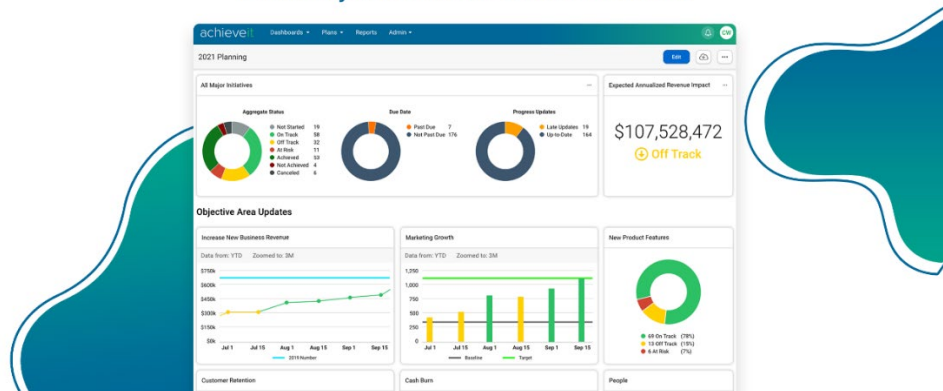
AchieveIt started in 2010 as a strategy consultancy company for healthcare systems before they created a functional strategic planning software as a solution to help organizations streamline their strategy processes and manage integrated plans with one single system.

This software has a lot of options for various industries, as this strategic planning software offers portfolio management, business transformation, goals and KPI monitoring, and PMO programs.

Pros:

♦ Interactive dashboard.

♦ KPI and scorecard monitoring system.

♦ Automated modifications for pending or lapsed updates.

♦ Strategy consultants and customer success managers to assist with the process.

Cons:

♦ Plan facilitation workshops only included at highest subscription tier.

♦ Lacks dedicated OKR functionality support.

Why OnStrategy is Better:

AchieveIt doesn't help build the core elements of a plan - including your mission, vision, values, and your growth strategy. OnStrategy's software suite does.

Profit.co

Best for organizations that want an OKR-only app.
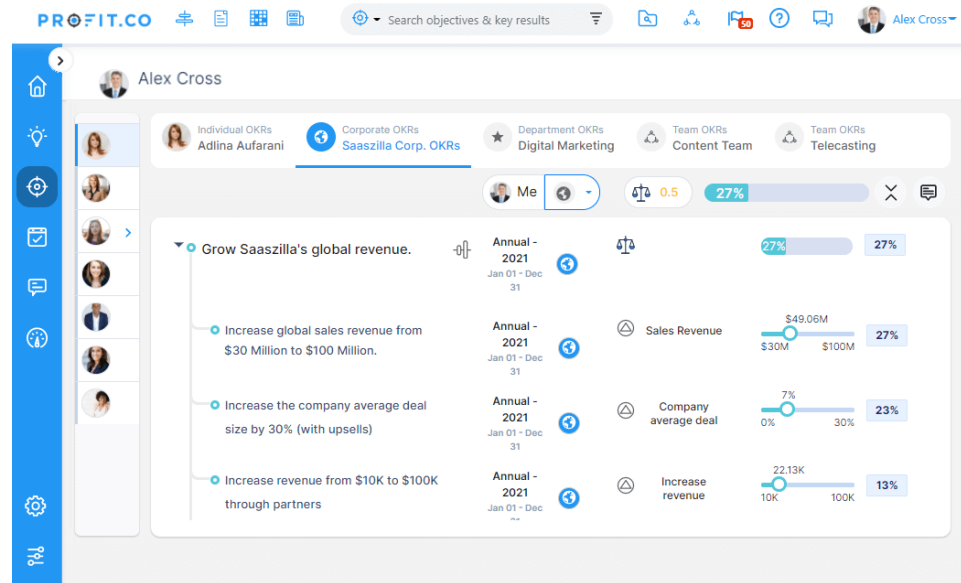
Profit.co serves as an OKR management, performance management, and task management software that also promotes employee engagement. Align teams with your dashboard so everyone can understand their company's goals and see how they contribute to it. Profit.co also has various key results that users can choose from—percentage, milestone, task, or KPI. This allows the user to differentiate and effortlessly track their key results.

Pros:

♦ **Inbuilt and custom KPIs to differentiate your key results and metrics.**

♦ **Built-in step-by-step guides and OKR templates.**

♦ **Dashboards that track real-time progress.**

Cons:

♦ **Not an all-in-one strategic planning management software**

♦ **No OKR or strategic planning experts to help guide or facilitate the process.**

♦ **Does not allow a place for strategic direction and vision statements.**

Why OnStrategy is Better:

Profit.co is best as an OKR management software only. If you need help building a comprehensive plan, OnStrategy is a better choice.

Conclusion

While clearly, we're (slightly) biased and 100% believe that our application is the best strategic planning software choice on the market, we wouldn't be content without you believing it too! We know that there isn't a one-size-fits-all option for everyone, but we strive to meet the dynamic needs of strategy leaders by offering a comprehensive and robust strategic planning solution to meet as many industry needs and budgetary limits as possible.

We are confident that when you compare OnStrategy's comprehensive strategy software solution to others in the industry, you'll see why we are the best choice for teams seeking alignment with their organizational strategy.

Strategic Planning Software Comparison Grid -

Features	OnStrategy	cascade	ClearPoint Strategy	achieveit	PROFIT.CO	smartsheet	Excel
Strategic Direction & Vision Statements - Aligns strategy to values, mission and vision statements.	✓	✓	—	—	—	—	—
Supports OKR Framework	✓	✓	✓	—	✓	—	—
KPIs - Ability to organize OKRs as KPIs	✓	✓	✓	—	✓	✓	✓
Collaboration - Allow users from multiple teams to collaborate for planning and implementation.	✓	✓	✓	✓	✓	✓	—
Progress Tracking - Monitor the progress of all activities related to strategy and identify opportunities for improvement.	✓	✓	✓	✓	✓	✓	✓
Notifications- Automated notifications keep teams focused on their OKRs.	✓	✓	—	✓	✓	—	—
Integrations- Integrates with other tools and communication apps	✓	✓	—	✓	✓	—	—
Reporting- Automates data and creates meeting-ready reports	✓	✓	✓	—	✓	—	—
Board Reporting- Reports dedicated to communicating progress to your board and stakeholders	✓	—	✓	—	—	—	—
Onboarding- Provides built-in onboarding for adoption.	✓	✓	—	✓	✓	—	—
Dedicated, Real-World Expertise [Available]- Dedicated expert consultants with years of real-world experience creating and implementing strategic plans.	O	—	—	O	—	—	—

OnStrategy

Start you free trial of the StrategyHub today.

Click here to get started.