# A Strategic Planning Template for Dummies



This is a very simple template that may be able to assist small business organisations and not-for-profit groups to facilitate their strategic thinking and consequent planning. Fundamentally, it's rather like a paint-by-numbers activity only in this instance you negotiate, in whatever manner you wish, so that you end up developing wise words for each of the criteria that are spread through this mind-map.

When you've done that, simply export your thinking and fine words to MS Word and, hey presto, you will have a pretty straight forward first cut of a strategic plan. But in saying that so glibly, it might be as well to remember the saying by that famous Scottish Bard, Robbie Burns, that "the best laid plans o' meece and men, gae angst astray". So that means you should revisit, review and revise your plan as life within your organisation unfolds and evolves.

As a final point, there is an accompanying power point slide show presentation I have developed to inform this template just as this template has been informed by that slide show. The slide show emerged from my having scoured the net in search of materials about strategic planning and, together with infused dollops of what I hope is common sense, seeks to summarise some of the more useful of those materials.

Have fun and may your strategies bring you success.

# 1 Introductory Statement

On the first page, perhaps even on the cover of your plan, you need to indicate just what it is about and who the authors of the plan are. Hence you may want to complete a statement rather like the one below. Remember that your organisational logo might look pretty splendid in there somewhere.

- *This strategic plan has been developed by XYZ group in order to provide a disciplined approach to the management of XYZ group over the next ABC period of time.*

- *Contact details.*

# 2 Background statement/history

It's always useful for somebody reading your strategic plan to be able to discover at least a little bit about the organisation. Hence, the need for some concise and pertinent pointers about your agency. Remember, the idea is not to write a novella but instead, the challenge is to be able to provide a paragraph or three about these sorts of questions:

- *When was the organisation formed and why?*

- *What led to it being formed?*

- *What key changes have occurred since it was formed?*

- *How is the organisation governed and how is it staffed?*

- *What support is received from which agencies and what levl of support has been received?*

# 3 Management Board and Staff

Outlining the structure of your agency is important in two quite distinct ways. First, a newcomer, or a visitor or even an auditor should be able to see at a glance what the management structure is for your organisation, both at an operational (staffing) level and at a governance (board) level. Second, the exercise of recording the way in which your structure operates (i.e. determining and recording who links to whom, for what purposes and with what forms of accountability) means that you will have reviewed such matters, perhaps for the very first time. It's not a matter of *forcing* such a review. Instead, what typically happens is that a review of the structure and functions of your agency encourages critical evaluation - a stock-take or reality check of where you're at! Frankly, this isn't always an easy thing to do because candid discussions about your organisational structure may unearth substantial diversity of thinking - perhaps even deep seated philosophical disagreements. But ultimately, such discussion is needed because honest dialogue represents a useful mechanism for gradually celebrating diversity whilst also aligning everyone's thinking in order to ultimately promote organisation unity. So here are some suggested tasks

- **List who is who and draw an organisational chart.**

  - *Perhaps have some biographical details about each person or even a photograph and contact details.*

  - *It might be very useful to have such information vetted by the individual before going public.*

- **Remember to also indicate representation on external agencies and identify representatives from external organisations.**

  - *It's folly to overlook external agencies - especially the ones who might be the benevolent benefactors.*

- *Again, biographical and/or organisational details and contact matters are important but have those snippets of information validated first.*

# 4 Organisational Tenets

A dictionary check will quickly show you that there are a number of quite useful synonyms for the term *tenet*. Fundamentally, it's about the guiding principles, the organisational beliefs, the behavioural creed to which you subscribe but for a strategic plan it is generally divided into three distinct elements - the organisational *vision* (what you want to become), the *mission statement* (what you want to achieve overall as an agency) and *values* (the standards of belief that you adopt and which shape the way in which you present and behave as an organisation).

You may wish to make a general statement about the tenets of your organisation - it's optional and entirely over to you. Whether or not you do write a general statement, you will need to specifically and carefully consider each of the dimensions which follow.

A word of caution - this is seldom, in the first round, a speedy task. It generally needs lots of discussion so don't be alarmed if it takes time. Another hint (rather than a word of caution); if you already have a vision, a mission statement and a well established set of values, you may actually need to critically review them. Just how long ago was it since you actually gave them the once over? Are they still realistic and relevant?

## 4.1 Organisational Vision

This is a short statement, carefully constructed which tells outside agencies what you really, really, really want to be.

- You may want to have a look at a sample of vision statements from a range of other agencies;

- How long or short are they and how precise are they?

- Just how do they capture and convey the essence of what that agency is about?

- Can you construct a range of possible vision statements and then merge them into one really, really good one that succinctly tells others what you really, really want to be?

## 4.2 Mission Statement

Mission statements are what the term implies - a statement about the reason for your organisation. Crafting a mission statement may require several sessions of thinking but the key point is not to dismiss seemingly flawed versions - instead - keep them and blend the good bits from several versions. Your challenge is to:

- Create an unambiguous *mission statement* that captures the fundamental purpose/s of your agency;

- This isn't about what you want be, but rather, it's about the reason/s for your existence;

- It's a good idea to have a look at other mission statements and to gradually forge one which synthesises the thinking of many inputs - just remember that your mission statement must be truthful to your organisation so don't become seduced by the fancy words of some other agency.

## *4.3 Values*

Fundamentally, writing down values is about using written words to express those beliefs which you expect members of your organisation and the organisation as a whole to uphold. In a way, these are the covenants, the belief principles by which you abide.

- A useful approach to arriving at some form of consensus about organisational values is to have individuals write down theirs, and then have them share their work with one or two others so that between them, they eventually achieve the most potent and precise wording that they can generate;

- An alternative way of working is to have a brainstorming session as a predicate to working as a plenary group towards achieving consensus about wording;

- It's also useful to not only check out what other similar agencies have developed, but also to allow for a review session which means your organisation undertakes to revisit initially completed work with a view to critically reviewing that work.

# 5 SWOT Analysis

Call it what you will: A SWOT analysis, a 360 degree scan, a reconnaissance, a bit of a sticky beak at what's going on. They all involve appraising the status quo as a predicate to determining planning goals and setting developmental priorities.

One way of proceeding is to divide a large sheet of paper into four segments and then provide everyone in your team with a bunch of post-it notes. A range of sizes and colours might be useful.

Ask them to write out what they think the strengths of the organisation are, and then ask them to nominate organisational weaknesses. (Almost invariably, people are better at finding the negatives so be warned that you may find a surfeit of grizzles but one way to overcome this imbalance is to stipulate that there must be an equivalent number of positives (*strengths*) or greater to the sum of negatives (*weaknesses*) that are nominated.)

Then repeat the process for identifying opportunities and threats. When all of this has been completed, ask two or three people to work collaboratively at assembling the post-its into similar or overlapping themes. (These might be thought of as *repeatable regularities* but remember that one-off or small unique clusters of comments can be hugely important too. (Just think of the little boy in Hans Christian Andersen's fairytale, *The Emperor's New Clothes.*)

A next step might involve a few other team members typing up the clusters of post-its that have been assembled and then, perhaps as a plenary group, the SWOT analysis can be written up. In a way, what you are doing here is completing a simple form of *risk analysis* although in doing so, ways of addressing and negating *threats*, and of optimising *opportunities* are not really detailed. Instead, they, together with strengths and weaknesses are merely compiled as preliminary data that can aid the strategic planning process.

## *5.1 Strengths*

Strengths can be come form within (internal) and from without (external). Equally, weaknesses, opportunities and threats can stem from within or can be precipitated by externalities. The key at this stage is to nominate those strengths using the range of techniques described in the topic immediately before this one. When your team has traversed those strategies, transfer the accumulated and distilled wisdom into a table such as the one below. And it doesn't matter if you use bullet points or truncated notes at this stage- you can always convert these into compact prose afterwards.

| Internal Strengths | External Strengths |
|---|---|
|  |  |
|  |  |
|  |  |

## *5.2 Weaknesses*

Once again, make sure that you have used the techniques described earlier (with a large sheet of paper, post-it notes and theme readers) so that in the end, you can complete the table below.

A question that might emerge is 'how much time will we need to do all of this?' and the answer is 'as long as it takes'. It's your plan and your quality. My experience has been that if the available time-span is intentionally concertinaed, effectiveness becomes enhanced as does efficiency. But that said, quality must not be allowed to suffer...

| Internal Weaknesses | External Weaknesses |
|---|---|
|  |  |
|  |  |
|  |  |

## *5.3 Opportunities*

There's a temptation to become grandiose here which is why the idea of splitting your data into Internal and External clusters makes sense. Frankly, there are likely to be an abundance of opportunities but the key thing here is to be realistic.

| Internal Opportunities | External Opportunities |
|---|---|
|  |  |
|  |  |
|  |  |

## *5.4 Threats*

The key advantage to identifying potential threats is that this provides a realistic mechanism for gauging adversity. Identifying potential threats means that they can be pro-actively addressed. It also means that they are less likely to ambush your organisation but remember that only the naive ignore the possibility of being surprised and bewildered by the unexpected. The secret is to realistically try to

identify issues that might crop up so that within your strategic planning, you can devise ways of ideally avoiding those matters or, if that's not possible, dealing with them in ways that cause minimal disruption.

| Internal Threats | External Threats |
|---|---|
|  |  |
|  |  |
|  |  |

# 6 Major Goals

Major goals are broad overarching aspirations that should be consistent with your vision and mission statements. Quite simply, goals are broad statements of overall intent. The next series of elements provide duplicated tables that can be used for planning. You can approach this task in one of two ways and either way is perfectly acceptable - it's the end- product that counts!

Either distribute a number of these planning templates for identifying goals and specific objectives and have individual people fill them in for each goal they'd like to see addressed. Alternatively, create working groups and have them address a specific set of goals and derivative objectives.

Whichever way you work is over to you but remember that you will need to bring the goals together if only to prioritise them and also in order to have them validated by your strategic planning team.

## 6.1 Specific Objectives

1. To … *(achieve something or other)*

| Strategy | Action Step | Person/s | Year | Completion | Evaluation |
|---|---|---|---|---|---|
| First Strategy here | Action Steps needed to achieve strategy | Who? | What year? | When finished? | How and by whom? |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

1.1 What resources will be needed?  Do you need to add another column?

2. To … *(achieve something or other)*

| Strategy | Action Step | Person/s | Year | Completion | Evaluation |
|---|---|---|---|---|---|
| First Strategy here | Action Steps needed to achieve strategy | Who? | What year? | When finished? | How and by whom? |
| | | | | | |
| | | | | | |

      2.1 What resources will be needed?  Do you want to add another column?

And so on...

# 7 Evaluation

When an awful lot of brain power has gone into dreaming up visions, mission statements and values, and when an equal amount of thought has been lassoed and corralled in completing a SWOT analysis, and when a huge amount of time and effort has been devoted to articulating goals and objectives, it stands to reason that we want to be able to show that our titanic efforts haven't sunk!

For that reason, a strategic plan needs to describe how evaluation will be completed. The first hallmark of evaluation involves showing what has (or has not) been achieved to date and this kind of evaluation can be undertaken at regular intervals as a form of developmental stock-taking.  Such an approach to evaluation is commonly referred to as *formative evaluation.*

The final test of evaluation involves demonstrating that what has (or has not) been achieved insofar as a strategic plan is concerned.  Such an approach to evaluation is referred to as *summative evaluation.*  Here evaluation is rigorously interrogates organisational performance with respect to whatever goals and objectives were nominated within the strategic plan.  The espoused philosophical tenets nominated by the organisation are also put under the spotlight and the extent to which values have been practiced, missions accomplished and visions achieved are critically scrutinised.

The discipline of evaluation is at once a science and a craft and it is not a matter that can be comprehensively addressed here.  However if people using this strategic planning template are interested in accessing an equally simple evaluation template, they should consider going to [www.woodhillpark.com](www.woodhillpark.com).

## *7.1 Formative Evaluation*

- How often, and against which criteria, for whom, and with respect to which, if any, goals and policies your agency has developed, will the initial (formative) evaluation occur?  Will you conduct formative evaluations more than once and if so, why and when?

- Specifically, what goals and objectives (nominated in your strategic plan) are being progressed and how well are you achieving what you set out to achieve at this point in time?

- What will you do with the information you gather during this formative evaluation?

- What now needs to be done, what has to happen in the future, and, what should you desist from doing at this stage?

- To what extent does your progress so far align with the vision, mission and values you have espoused in your strategic plan? In other words, how well is your agency walking the talk at this stage of the overall plan?

- Do you want to see an evaluation model? If so, go to [www.woodhillpark.com.](www.woodhillpark.com.)


## 7.2 Summative Evaluation

- Against which criteria, for whom, and with respect to which, if any, of the policies and plans your agency has developed will the final (summative) evaluation occur?

- To what extent has your operational plan and the various annual reports you've prepared addressed your strategic plan?

- How can you use the data you have gathered when completing your summative evaluation for informing the next cycle of strategic planning?

- How valid are the tenets you have operated under for the duration of the strategic plan? Do they still apply and if not, how and why should they be revised?

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