



Steps in Strategic Planning

A strategic plan -- a road-map to focus an organization's effectiveness -- helps answer why it exists, who it serves and how its programs and services meet the needs of those it serves. It provides the "goose sense" to all pull together in the same direction with the right people, resources and funding.

Steps in strategic planning

Preparation

Preparation entails meeting with staff, board members and often key external stakeholders to determine how a strategic planning process will unfold. It may also include preparatory training, in areas such as group process or conflict management.

Producing the Plan

1. **Where are we?** Here an organization looks at both the internal and external context in which it operates. In this step an organization examines its history, trends, resources available, strengths, weaknesses, competition, alliances, etc.
2. **What is our purpose?** Drawing upon the work in step one, this step focuses on revising, or creating an idealized image of what future success looks like (vision). It also answers the question "why do we exist?" (mission) by addressing the problem the organization is trying to solve.
3. **What's keeping us from achieving success? What strategies or approaches should we adopt?** In this step an organization explores how to achieve the picture of success defined in Step 2.
4. **How will we implement the strategies?** In this step an organization seeks to answer the

questions, of "Who will do what, by when, for how much?" for the strategies agreed upon in step 3.

On-going Implementation

Once the plan is created, it gets implemented by carrying out the action steps identified in Step 4. Although many organizations carry out the planning component, most neglect the implementation phase that's so necessary for success.

Effective organizations regularly revisit how they are doing (every three to six months) by checking in on what is working well and what may need to change or be adjusted to continue the journey towards achieving the vision.

envision SYNERGY's approach

envision's Strategic Planning sessions hone organizational focus and set direction for maximum impact, resulting in a clear strategic vision and action plan. Whenever possible we animate the process with visuals, using a tool called "graphic recording."

envision is dedicated to the uncompromising advancement of a healthy planet with happy, resilient people. As this complex work needs "all hands on deck," **envision** catalyzes collaboration across silos, organizations, jurisdictions, sectors, and academic backgrounds. We support you in creating innovative, durable solutions that foster systems thinking and span organizational boundaries. Along the way, we build strong organizations that can both effectively carry out their work and are well-poised for effective collaboration.

Catalyzing collaboration for durable, broadly supported, creative environmental solutions

Facilitation, mediation, evaluation, graphic recording, capacity building

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