

# Steps for Strategic Planning/Goal Setting



- ✓ Check if you're covering all of these "best practices" for conducting strategic planning and setting goals.

## Before Planning Meeting



- ❑ Plan to hold a strategic planning/goal setting meeting in a casual, bright facility. If your planning meeting involves others, consider holding the meeting off site. Set up in rounds or a U shape table (not boardroom style). This promotes long-term thinking and a more democratic way of reaching consensus.
- ❑ Consider booking a professional outside facilitator/consultant. If you use a facilitator, brief him or her fully on how you or the group operates and provide copies of any previous plans. An objective leader helps everyone think through the strategic/goal setting process.
- ❑ Have all participants complete a SWOT questionnaire (strengths/weaknesses/opportunities/threats). Consider also having this questionnaire completed by other stakeholders. If applicable, provide a summary of these questionnaires to others 7 days before the event with the names withheld. This will start people thinking strategically prior to attending.

## During Planning Meeting



- ❑ Consider mega issues first i.e. economy, technology, demographics, regulations, social (focus on the future). This promotes 'big picture' thinking.
- ❑ Ask questions that drill down to objectives, such as:
  - ~ *What are the issues?*
  - ~ *How will they affect the group, clients/customers, members or stakeholders?*
  - ~ *What could the group do to prepare for these future mega issues?*
- ❑ Review any previous strategic plan/goals (from the perspective of "effort" not completion) in order to define success.
- ❑ Discuss SWOT results as a springboard for setting objectives. Look for common themes and differences.
- ❑ Identify a limited number of priorities that you or the group will focus on to prepare for the future. Four to six goals are manageable.
- ❑ Prioritize those goals to determine where the resources will go.
- ❑ Describe the desired outcomes for each goal in order to define future success.
- ❑ Delegate each goal if others are involved. If you don't give it to someone, no one is responsible for it.
- ❑ Review your mission statement and determine if it needs revising.

## Steps for Strategic Planning (cont'd)

After  
Planning  
Meeting

- ❑ Circulate a draft and if necessary get official approval to make the strategic plan/goals formal.
- ❑ Give clear mandates/guidelines to anyone or any group assigned one of the goals to prevent misunderstandings.
- ❑ Allow time for the individuals or groups to create suggestions to accomplish the goal for approval. This gives them ownership and supports democracy.
- ❑ Do budget adjustments based on the work that needs to be carried out. Remember that major goals need to be funded.
- ❑ Create or have an operational plan created that will detail the actions required and people responsible to accomplish the goals. Make it real and practical so that everyone can succeed.
- ❑ Publish the plan to all participants and stakeholders.
- ❑ Create agendas that monitor the plan/goals so that is front and centre whenever you discuss or make decisions.
- ❑ Agree on completion dates and what will constitute success to keep your efforts on track.

*Strategic planning/goal setting is a process,  
not an event.*

