

Essentials of Strategic Planning

Presented by Al Spada





PHOTO: PETER YAN

“An idiot with a plan can beat a genius without a plan.”

Warren Buffet

What are
common
mistakes in
strategic
planning?

Common Mistakes

7 Common Strategic Planning Mistakes – “Road to Ruin”

WRONG REASONS

WRONG PEOPLE

WRONG ROLES

WRONG PROCESS

WRONG HELP

WRONG
OUTCOMES

WRONG
IMPLEMENTATION

What is the
structure of a
strategic
plan?

Strategic Plan

Strategic Plan Framework

Vision

How will the world be different if your association is successful?

Mission

What is the role of your association in achieving the Vision?

Organizational Goals & Strategy

How will your association achieve this role?

Resource Goals & Strategy

How will your association finance and sustain this role?

Delivery Goals & Strategy

How will your association activities be delivered?

Governance

How will your association monitor progress and make decisions?

Strategic Plan Framework



As you move from Vision to Delivery, the focus shifts from volunteer leadership to staff – from strategic outlook to tactical implementation.

Who should
participate and
what are their
roles?

Participants & Roles

Potential Participants

Volunteer Leaders

Staff

Subject matter experts

Members

Nonmembers

What
information
informs
strategic
planning
discussions?

Data

Audience Outreach

- Broadest possible reach (**inclusive**)
- Diverse perspectives that include legacy and emerging audiences (**better decisions**)
- External perspectives (**new ideas**)

Future - Focused

- Past strategic plans dealt with historical issues.
- Identify the future state in which you will need to be successful.

Transparent, Data - Driven, and Objective

- Transparency is your friend.
- Data drives consensus.
- Objectivity helps creativity.

Key Questions



WHO DO WE SERVE?



WHAT IS THE WORLD IN WHICH THEY LIVE AND WORK?



WHAT ARE THEY TRYING TO ACHIEVE?



WHAT ARE ALTERNATIVES IN THE MARKET?



WHAT IS THEIR RELATIONSHIP WITH THE ASSOCIATION?

Association Laboratory Inc. Answering these questions can be simple or involve substantial integrated research. Regardless of how sophisticated the approach, the basic areas of investigation are the same.

How do you
create useful,
productive
discussions?

Discussions & Vetting

Goals? Creative, Diverse Discussions

- Better participant engagement.
- Better strategic perspectives.
- Better decisions.



Advice & Tips

- Be Patient
 - Develop understanding before conclusions
 - Develop conclusions before recommendations
- Be Open - If you find that you disagree with someone, explore why
 - Different perspectives
 - Different definitions or terminology
- Trust the process but don't sacrifice outcomes on behalf of the process
- Don't be afraid to ask difficult questions
- Small groups – go around the table once to get everything out; then identify questions, agreement, or disagreement

What is
essential to
implementation?

Implementation

Strong Process Supports Implementation

RIGHT
REASONS

RIGHT PEOPLE

CLEAR ROLES

INCLUSIVE &
INFORMED
PROCESS

HELP AS
NEEDED

CLEAR GOALS

CLEAR
STRATEGIES

Strategic Breakout Planning



- What is your SEAs experience with strategic planning? What worked or didn't work?
- If your SEA does not have a plan, what is the reason? What are the barriers?
- Where would your SEA benefit from a strategic planning effort this year?