

Strategic Planning Process

The first step in achieving your vision is to plan for strategies for success. This document will summarize a number of recommended steps for organizations to help with this process. Although, this document is not intended to describe the process of creating a vision and mission statement, and relies on existing vision and mission, it takes into consideration several key requirements to help with the strategic planning process. There are times, where a function or a divisional business draws its inspiration from the overall corporate vision statement. Regardless, the mission statement, which describes their reason for existence is still a critical element.

The Vision

Start the process by clearly defining the vision. The vision defines your preferred state in the future, but it also is a representation of your values, mission and specific to your situation. The vision must be simple enough so that the employees can internalize, and it has to be specific enough so that everyone can understand it. The best vision statements are also inspiring and they help drive the right behavior. My favorite: Ford's vision statement under Alex Trotman: ***"Quality is Job One"*** – Simple, to the point and inspirational.

The Mission Statement

The mission statement is your purpose for being and clearly explains what you need to do in order to be successful. The mission statement should also be short and to the point, otherwise the employees and customers will not remember it. My favorite: Google's mission statement: ***"Google's mission is to organize the world's information and make it universally accessible and useful."*** – No confusion, clear, simple and memorable.

Current State

One of the key components of Strategic Planning is to know where you are now. You should perform this evaluation based on both internal as well as external factors. Comparison with other functions, businesses and competitors are all part of this process. There are three key activities in this step:

1. **Current Accomplishments:** Describe what progress you have made to date and how well these achievements are helping your ultimate goals
2. **Best in Class Market Trends:** This is the external verification so you know what your customers are seeing and what best in class practices are
3. **Gap Analysis:** What you need to improve to bridge the gap between where you are and where you need to be.

The outcome of gap analysis may be entered into the goal logs to close the gaps (i.e., organizational development efforts)

Strategic Goal Mapping

Goals are specific actions to achieve your vision. These goals must have a direct correlation between the actions and the vision. To come up with a set of goals and objectives to achieve your vision, you will need to push the boundaries and create stretch goals. If your organization is complex and you'll need to sift through large amount of data, a recommended tool to use is the affinity diagramming. The affinity diagram helps you to collect many ideas, opinions, or issues and organize them in a cohesive manner and ultimately link them to the vision.

Implementation Plan, Business Alignment and Sponsorship

The next step in the process is to come up with a high-level implementation plan and to gain the business support and executive sponsorship. This step requires communications with key business leaders in the company to describe the type of projects envisioned by this process and the most successful projects have a solid executive sponsorship that receive blessings from all senior management in the company. Remember, this is not a passive activity and will require the sponsor(s) to be fully engaged.

Scenario Planning

Recently, we have witnessed many surprises in the market place. This has forced the leaders in companies to perform what is called Scenario Planning. This exercise plots the goals in 4 different quadrants, from the best case to the worst case and identifies scenarios, goals and action items for each should other realities come into play. This is not a required step, but is certainly a helpful one, should the company find itself in a precarious position.

The Communication & Change Management Plan

Strategic plans are a perfect communication tool to coalesce the organization towards the vision. Communication planning should be designed into the strategic planning process and is not an activity to be done after the process is complete. You will need to announce the process, communicate progress during the process and continue on an on-going basis. Remember, this process is a journey and not a destination. Your organization should be always on the move, and so should your strategies and communication is an effective tool to keep everyone apprised. This plan will also act as your change management plan, without the negative connotations associated with the change management plans

Monitoring

Part of the communication plan is a tracking system that reports progress against intended goals. Keep in mind that you will get the results of what you track, so be very careful on what you track. Creativity is a good way of representing the progress and make sure you have two-way communication and build "customer" involvement in the process.