Strategic Planning – Not a “One Size Fits All” Proposition - by Janus S. Small

If you’ve never done it – or never had a good experience doing it – the words “strategic planning” probably send a chill up your spine and bring to mind phrases like wheel spinning, navel gazing, too academic, and big waste of time. But if you’ve had a great strategic planning experience, you know what an invigorating and creative experience a well designed and well facilitated planning process can be! - and most important, a process invaluable to the success of your business, be it big or small, new or well established, major manufacturer or one-person stained glass art studio, non-profit or for-profit.

Just what is strategic planning? Simply stated, it is a systematic process through which an organization explores and focuses its mission, vision, and priorities in response to an ever-changing environment and ensures that all members of the organization (be it Board, staff, volunteers and constituency, or owners, employees, customers, and vendors) are working towards the same goals. A strategic plan becomes the umbrella under which specific, action oriented annual work plans are developed and against which new opportunities are tested and vetted.

What are the components of a strategic planning process? Meetings, work sessions, retreats, whatever terms you prefer to use to reflect thoughtful time away from the day-to-day responsibilities of running your business, surveys, interviews, focus groups, SWOT analyses, environmental scans, and more might all be considered as tools and techniques for gathering information of importance, both internal and external, to your organization. But most important - strategic planning is not a cookie cutter process. There is no template, no one size fits all model for developing the process right for you.

How might you begin to shape your process? There are many factors that determine just how in-depth any given strategic planning process should be for example: an organization’s resources (time, money, people), level of satisfaction of those being served by an organization and those providing the service, leadership shifts within an organization, significant shifts within the external community, external requirements (funding agencies, etc.). A process can be designed to be comprehensive, thorough, and meaningful, however, at a variety of levels.

What is most critical to whether a planning experience is nightmarish or is amazing and productive beyond all expectations is to develop a process with a scope matching the specific needs and resources of an organization at a given point in time. It is important to work with an experienced and creative strategic planning facilitator to address some key questions upfront: have you done a strategic plan before?; what is your annual planning process like?; what are your hopes and dreams for your organization?; what are the biggest challenges facing your organization?; who are your competitors and what do you know about them?; how much time are you and your colleagues able to put into this process?; what is your budget for the process, both time and dollars? Based on your input, your facilitator will develop a planning process uniquely tailored to your organization and will guide you as you explore the future of your business, examine realities and possibilities in relationship to your aspiration, and develop a plan to serve as your roadmap in making your business vision reality.