
Introduction to Strategic Planning

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What's the Difference between Strategic Planning and Operational Planning?

Strategic Planning asks:

Are we doing the right thing?

Operational Planning asks:

Are we doing the thing right?

What are some examples of strategic questions?

- Why are we here? (purpose, mission)
- What are we to do? (role, niche)
- Who is to benefit? (target population, customer)
- What results are we aiming for? (key outcomes)
- How are we to be? (values, guiding principles)
- What are the key bold moves we need to make at this time, to use the power and resources we can access for best impact? (strategies, priorities)

Cycle of Strategic Action



Strategic planning vs strategic action

- Strategic planning is a formal process that organizations or partnerships use once every 3 -5 years to consolidate and refresh their strategic thinking
- Strategic action is a set of behaviours taken by everyone in the organization to detect important shifts inside and outside; alert others to the need to pay attention; and develop “on the fly” strategies together to respond

What's Triggering the Planning?

- Strategic action is something all successful organizations build into their day to day work
- Strategic planning – the more formal strategic work -- can be a good move for an organization or a set of partners when:
 - something significant changes in your environment
 - a new leader wants to work with the key players to develop a common vision and strategy
 - you are faced with critical issues that must be addressed if it is to continue to achieve effective results
 - you wants to re-position your organization
 - you want to enroll the hearts and minds of key players – staff, unions, funders, partners by involving them in the providing input into the strategies

Process is crafted in response to what you want from it

- Based on what you want from the planning, we develop a process with you
 - strategic planning light – can be as simple as convening some strategic conversations with key players
 - we often use work books to help summarize environmental scans and crystallize critical issues for those who will engage in strategy development
 - coaching with leaders and management teams helps reinforce strategic leadership competencies