**Reasons Why Strategic Plans Fail**

* **Check the box that might be your most challenging issue:**
* **1. Event Thinking**

Strategic planning is viewed as an event or a task, instead of a transformational ongoing process.

* **2. Top-Down Ego**

Strategic planning is created top-down and characterized by ego and arrogance, instead of humility and listening.

* **3. Interruption**

Strategic planning is seen as an “add-on” interruption to my “real work,” instead of becoming absolutely core to my role.

* **4. Extra Expense**

Strategic planning is allocated as an extra expense (that is often cut) instead of a critical core investment.

* **5. Report Syndrome**

Strategic planning conjures up complex and time-consuming exercises and

reports, instead of being the servant to a simple and elegant plan that is grounded in the alignment between the mission and effective goals.

* **6. Sacred Cows**

Strategic planning “economizes” by involving fewer and “safer” stakeholders who honor tradition, dead horses and sacred cows, versus out-of-the-box dangerous ideas!

**Reasons Why Strategic Plans Work**

* **Check the box(es) that has the best potential for improved results:**
* **1. Strategy Becomes Part of the Culture**

Strategy is part of the ongoing transformational process of organization.

* **2. Collaborative**

Past, current, and future stakeholders are invited into the process of identifying a prioritizing the most effective steps forward for the organization.

* **3. Integrated**

Strategy becomes a core piece of the ongoing work of the organization. It is given priority time and space in the overall workflow.

* **4. Strong Return on Investment (ROI)**

Strategy is viewed as a primary means for creating significant ROI for the organization’s mission and stewardship.

* **5. Focused and Usable**

Strategy that works is focused on a few key initiatives with plans and tactics that are tied to vision and measurable goals.

* **6. Mission Relevancy**

A tenacious discipline exists to express the mission in ways that are relevant to the world as we know it now, not 50 years ago.

* **Recommendation: *The Rolling Three Year Strategic Plan*** developed by John Pearson adapted by Ed McDowell

The Rolling Three Year Strategic Plan has been around in a variety of forms.

The premise is simple:

* Strategic Planning is done every year covering a period of three years.
* As the first year is completed, a new third year is added. There are always three years in view.
* A placeholder for “beyond 3 years” is provided to keep an eye on future direction.

The benefits are clear:

* Works well for most boards, leaders and teams.
* Functions well in simple and complex settings
* Collaborative
* Drives Strategic Thinking and Planning into the Culture of the Organization
* Focused & Communicates well

This strategic planning process covers:

* Mission, Vision, Values, Strategic Priority
* What the people we serve value.
* Environmental Scan
* S.W.O.T. Analysis
* Trends
* Assumptions
* Visionary Priorities
* Top-5 Goals
* The Rolling 3-Year Strategic Plan Template

|  |  |
| --- | --- |
| Promise | Describes WHY the organization exists |

|  |  |
| --- | --- |
| Mission | Describes WHAT the organization does |

|  |  |
| --- | --- |
| Future Direction | Describes WHERE the organization is going |

|  |  |
| --- | --- |
| Values | Describes what will always be true of your organization in pursuing mission. |
| Tag Line or Slogan | Unique Identifier of the organization that speaks to the Promise. |

|  |  |
| --- | --- |
| Strategic Next Steps | Focused priorities of the organization over the next three years, updated annually. *It is strongly recommended to limit the organization to* ***nor more than 5 in any one year****.*  |
| **Strategic****Next****Steps*****(no more than 5*)** | **Year 1 Goal(s)** | **Year 2: Goal(s)** | **Year 3: Goal(s)** | **Year 4 & beyond: Goal(s)** |
| **#1:**  |  |  |  |  |
| **#2**:  |  |  |  |  |
| **#3:** |  |  |  |  |
| #4: |  |  |  |  |
| **#5:**  |  |  |  |  |

**Note: Limit this page to the Organization’s strategic next steps and goals.** Departments, teams or divisions of the organization should develop their own set of measurable initiatives and tactics that focus on achieving the strategic next steps and goals of the organization.