

# Elements of a Strategic Plan

<b>The Process</b>	Select a facilitator/consultant that has a track record for scaling Mt. Everest—and empower that person to select the methodology that has worked well for him or her in the past.
<b>The People</b>	Board/staff task force? Staff-only task force with regular updates to the board? Either way, leverage their CliftonStrengths®.
<b>The Placemat</b>	Wordsmith the one-page placemat with prayerful discernment and an eye to communicating the plan to multiple customers (board, staff, donors, clients, volunteers, etc.).
<b>The Proclamation</b>	Get the plan off the shelf and into the streets! Completing the plan is just the start. Now you must sell the plan.
<b>The Progress</b>	Monitor Results: Dashboards. Targets. Measurements. Metrics. Monthly Updates. Make strategic planning an on-going, year-round process—not a one-time event.

## **STEP 1: APPOINT A TASK FORCE**

Generally a combination of key staff and two or three board members.

## **STEP 2: CREATE THE PLANNING CALENDAR**

For most organizations without a written strategic plan, this process might range from three to nine months.

## **STEP 3: SEEK BUY-IN**

Ensure that the CEO (or senior pastor), senior team, and the board agree that the time is right for a strategic planning process and that there is passion, time, and budget to accomplish the plan. (You never have a second chance to make a first impression.)

## **STEP 4: APPOINT OR RETAIN A FACILITATOR OR CONSULTANT**

Discern if you have internal expertise to facilitate this process or if you need to recruit a volunteer or retain a consultant.

## **STEP 5: APPOINT “CHAMPIONS”**

Discern if you have internal expertise to facilitate this process or if you need to recruit a volunteer or retain a consultant.

## **STEP 6: PLAN A CELEBRATION**

Create the expectation that you will be successful and put a celebration date on the calendar and assign your best party-planner to organize the event.

## **STEP 7: AFFIRM THE ANNUAL PLANNING CALENDAR**

To ensure that this is a “rolling” three-year plan (that adds one more year every year—so you are always looking ahead three years), set key target dates for the next 12 months. Build strategic planning into the DNA of your organization so it’s similar to your budgeting and monthly financial reporting cycle—not a one-time annual event that provokes groans and excuses!

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Read Chapter 10, “The Hoopla! Bucket” in John Pearson, *Mastering the Management Buckets: 20 Critical Competencies for Leading Your Business or Non-profit* (Ventura, CA: Regal, 2008).