



3 Year Strategic Plan

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!

Adapted from the work of John Pearson by Ed McDowell for Murdock Trust 1/5/2021



3 Year Strategic Plan (*cont.*)

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.



3 Year Strategic Plan (*cont.*)

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



3 Year Strategic Plan *(cont.)*

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:

**Top Action Steps
Over the Next 3 Years**

*Describes what will always be true of your organization in pursuing mission (**no more than 5 in any one year**; updated annually):*



3 Year Strategic Plan (cont.)

THE ROLLING 3-YEAR STRATEGIC PLAN TEMPLATE (cont.)

TOP ACTION STEPS	YEAR 1 GOAL(S)	YEAR 2 GOAL(S)	YEAR 3 GOAL(S)	YEAR 4 AND 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.