



# Strategic Planning — The Process

## 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 Executive Director, 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).