

Prepare a Plan and Make Next Year Your Best Year Ever

by William P. Marino

Strategic planning gets a lot of press, but it's not simply that a business or organization puts a plan on paper that's important; it's the process that the plan puts in place. Strategic planning comes in many shapes and sizes, from a detailed narrative on every aspect of business operations to a one-page outline showcasing the important goals for the coming year. Strategic planning is a solid first step in ensuring that an organization has an opportunity to achieve its goals for the coming year. Why? Because plans, like ideas, are great, but the ability to execute is what makes the difference.

There are seemingly unlimited providers who will help facilitate a strategic planning process; I've been asked numerous times to help for-profit and non-profit organizations, small and large, through the process. In my experience, I've found that a simple five-step approach works best:

1. **Reflect on the successes and shortcomings of the past year.** Take time to talk about what worked and what didn't. Extract key takeaways from both and write them down. Then, include these findings in your thinking as you move forward to the next step. Learning from mistakes and building on successes is integral for all of us—as individuals and organizational leaders.
2. **Isolate three to five goals** you want to achieve in the coming year. Ask yourself: "Where is there room for improvement?" or "What do we need to change?" Then, write a goal statement focusing on this area. Think in terms of both the financial and operational fronts, such as revenue, expenses, and profitability or client services, footprint growth, or programming. Write down these goals in priority order.
3. With these goals in mind, **develop programs and activities** that will help you achieve those goals. These initiatives should be specific and measurable. Remember, organizations come in many sizes—from the single operator to the multi-national—so programs must consider the level of resources available to realize a set of objectives. Be realistic, but don't be afraid to stretch.
4. Now for the step that most forget or avoid: **Select an associated set of metrics.** One of the definitions of "metrics" is the science of measuring. That's what we're talking about here. Set a quantifiable figure that measures a key

aspect of each program. The metrics might be a percentage of year-over-year improvement or an incremental increase in volume. Programs can have multiple metrics, if desired. Always include a target date for completion. Don't let this step waylay your planning. Set metrics that you believe are achievable, but don't labor over it. Remember, it's not a crime to fall short of a target metric. It's a way to measure progress.

5. Now with steps 1 through 4 on paper, **revisit your plan quarterly.** Review your programs and associated metrics. Make changes, or course corrections, as the evolution of your organization and the business environment dictate. This is a critical component that makes your planning an ongoing, organic process.

A final thought: Don't plan in isolation. Solicit ideas and reactions from within your organization, whether from your spouse, a fellow board member, a business partner or key personnel from each department or region. Make strategic planning an inclusive process. After all, it will (or should) impact every person in your organization and will require their commitment to achieve the goals.

Remember: It's not just the plan—the words on paper are important, but it's the process the plan puts into place that matters most. Why? Because it's the execution of the programs and the iterative review of progress based on the imbedded metrics that propel an organization forward.

Planning is not just a once a year activity...it's all year, all the time, because it's a key driver for the ability to execute, and execution is what drives a business or a non-profit organization toward its goals. Setting a course that helps you work toward your goals is something that can turn your next year into your best year ever. ☺

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A Simple and Effective Strategic Planning Worksheet

STRATEGIC STATEMENTS (review to insure ongoing alignment; these are touchstones for your organization)

Vision:

(an “ideal” for the future; how you will change the world (or your community or industry); very short—one bold, aspirational sentence)

Mission:

(an objective or means to achieve the vision; required action(s) to get you there; what you do & how you do it; one sentence or a short paragraph)

Values:

(core values/beliefs you consider integral, indisputable, and inviolable to your organization, to which you require alignment and accountability)

KEY ACCOMPLISHMENTS (last 1-2 years, if applicable)

KEY AREAS FOR IMPROVEMENT (for next year or two)

SWOT ANALYSIS

Strengths

Weaknesses

Opportunities

Threats

PROPOSED GOALS & ASSOCIATED PROGRAMS/PROJECTS & METRICS FOR THE REMAINDER OF CURRENT YEAR AND THE NEXT CALENDAR YEAR

Goal – What you want to achieve (and by when)

Program/Project – How you will achieve the goal (what you will do)

Metric – The way you can measure success (quantitative or yes/no)

PROPOSED GOALS & ASSOCIATED PROGRAMS/PROJECTS & METRICS FOR SUBSEQUENT YEAR

Same as above

Suggest making Strategic Plans that cover at least two calendar years.

Remember re-visit your plan quarterly!!