

# Strategic Planning Primer

Source: 1999 ABA Bar Leader Institute, "Charting Your Course"

## **What is Strategic Planning?**

Strategic planning involves successful management of change through well thought out strategies and implementation plans. Planning will provide you with a guide on how to develop a vision of success and how to use human and financial resources to bring about that vision.

Planning is not an exercise in forecasting, rather it is an exercise in creativity. You can not blueprint exactly where you will be in five years nor would you want to. Planning is a dynamic process that outlines a direction and provides a framework within which you can design and implement specific strategies and programs. The process is never static. Any plan must be constantly adapted to new circumstances on a regular basis.

## **Why Plan?**

Planning forces you to re-examine your activities and why you are doing them. It will give your entity a sense of direction and provide a central rationale for decision making. It will organize you and focus your efforts.

A plan will help you make meaningful changes at a reasonable pace and within your resources. It will help you define your mission or purpose and realize your goals. Best of all, it will help you avoid crisis management.

## **How To Plan**

The most important thing in planning is the process itself rather than any written plan you may complete. The process is dynamic. It gets a group working as a team to determine a vision of success and how they might go about realizing that vision.

Through the group process and shared experiences, participants in a planning session come to a common understanding of what they have accomplished and what their strengths are. This helps reaffirm their ideals and gives renewed energy to look to the future.

Because the process is much more important than any written document, it is essential that you involve current and future leaders of your entity in all of your planning efforts. Their active participation will ensure support in the plan's implementation.

# Some Key Planning Questions

- What is our basic mission?
- What are our underlying philosophies and purposes?
- What are the association's long and short range objectives?
- Are the objectives in balance?
- What programs are going to be obsolete?
- What will be our cash flow over the next few years?
- What and where are our markets?
- What share of the markets do we wish to get?
- How will we get the shares we desire?
- Who are our major competitors and what are they likely to do of disadvantage to us?
- What major changes are taking place in our environment that will affect us?
- What opportunities or threats exist in the years ahead that we should exploit or avoid?

# What Will Planning Do?

1. Change and/or affirm direction of the association.
2. Accelerate or maintain program growth and improve revenue production.
3. Enrich appropriate staff and volunteer involvement by giving them a vital piece of the action.
4. Identify strategic issues for top association leadership and management consideration.
5. Concentrate resources on important things. Guide the association in developing new programs; allocate assets to areas of best potential.
6. Develop better information for volunteer leaders and the association staff managers to make better decisions.
7. Develop a frame of reference for budgets and short range operating plans.
8. Develop situation analysis of opportunities and threats to provide better awareness of the association's potential in light of its strengths and weaknesses.
9. Develop better internal coordination of activities; maximize impact of limited resources.
10. Develop better communications and public relations by making everyone better able to interpret the association's goals and achievements.
11. Provide a road map to show where the association is going and how to get there.
12. Set more realistic, demanding yet attainable objectives.
13. Review and audit present activities so as to make proper adjustments and modifications in light of changing environment and the entity goals and objectives.
14. Provide awareness of changing environment in order to better adapt to it.

# A Process For Strategic Planning

Each entity should plan for at least one two-to-three hour session.

Someone should “run” the session and record the group’s responses on flip charts.

(That person should be familiar with the process and have general familiarity with the association.)

It is usually better to have key leaders as part of the discussion group rather than serve as facilitators.

Each of the 24 questions on the “Long-Range Planning Questions” sheet should be asked and as many responses as possible from the group should be recorded for each question.

Leader should try to get at least one response from each member of the group to each question.

Once a range of responses to each question is recorded on the flip chart, the group should select the several items that it believes to be the most relevant or important. This is accomplished through open voting or preferably, consensus.

The leader should keep the session(s) focused on the task; moving at a fast pace; remain flexible as to the needs of the group; and provide a fun environment for work.

# Components of a Strategic Plan

There are a few essentials that you will need to develop your strategic plan. They are:

1. Assumptions about your association and its environment that form the basis of the plan.
2. Identification of internal strengths and weaknesses
3. Identification of external strengths and weaknesses
4. A mission statement
5. Goals
6. Strategies
7. A list of program priorities and activities

## Internal Analysis

Conducting an internal analysis helps you determine what your internal environment looks like. What are your strengths and weaknesses? What are some of the trends and issues you will be facing? What are those aspects of the internal environment that help or hinder you in achieving mission and goals. Some areas for self-examination include:

- A. Finances - how your finances are managed; future projections of revenues; sources of non-dues revenue; cost-efficiencies potentially and existing.
- B. Structure - A of review of your association's structure and its strengths and weaknesses.
- C. Membership Analysis - Membership demographics, motivation and needs; social and behavioral factors and service expectations.
- D. Programs and Services - How you can be effective in implementing goals and priorities; how to review programs; methods for sunseting programs at the end of their life cycles.

# External Analysis

The external analysis also helps you define the issues that you will be facing in developing a strategic plan. What are the opportunities and the threats in your environment? What do your members want from you? Some key questions to ask are:

- A. What is it that really makes your organization stand out?
- B. What do you do so well that you are head and shoulders above everyone else?
- C. What major advantage in programs, projects, and products or services do you have over any similar organizations?
- D. What makes your organization unique?
- E. What is it you can do for your constituents better than anyone else?

## Goals

Once you have determined what your purpose or mission is, you will want to define five or six broad goals to support that mission. These goals are open-ended statements of what you intend to do to carry out your mission. The goals usually last from three to five years. They will further help the association focus on what its philosophy and how it should be supported.

## Strategies

After you have looked at your internal and external strengths, at the opportunities and threats in your environment, at what the issues are for your members, you will then want to develop specific strategies.

The strategies focus your efforts to achieve your mission, goals and address the issues by providing guidance for decision-making and action. For your plan to succeed, you must implement specific steps to achieve these general strategies. These strategies will become the basis your action plans for the next five years so that you can meet the needs of your members.

# Implementing Your Plan

Keep your mission and goals constantly before your members.

Develop specific action plans so that they support your strategies. If an activity doesn't support your objectives, you probably shouldn't be doing it.

Make the plan available to all your constituents and ask them to translate the goals and strategies outlined in it to their annual planning objectives.

To maintain an open and flexible process conduct yearly evaluation of programs, based on your identified priorities. This will allow you to continually redefine how to meet the priorities outlined in your plan.