

Strategic Planning

A strategic plan is a written statement of a group's assumptions about where it wants to be in the next 10-50 years. Why is it so important to create a strategic plan? What should it contain? This talk will provide an overview of strategic planning and why it is essential to the future of your organization.

Bobb Biehl is an Executive Mentor. In 1976, Bobb founded Masterplanning Group International. He has consulted personally with over 500 clients. He has met one-to-one with over 5,000 executives and invested an estimated 5,000 hours in private sessions with some of the finest leaders of our generation. Based on thousands of hours of practical experience, he has originated 40 tools (books, tapes, notebooks) in the area of personal and organizational development. For over 31 years, Bobb was on the board of directors of Focus on the Family. He holds a bachelor's ('64) and a master's degree ('66) from Michigan State University. Bobb and his wife, Cheryl, have been married since 1964. They have two adult children, two grandchildren, and four great grandchildren. His website is www.bobbbiehl.com.

STRATEGIC PLAN

A PLAN – is a written statement of a group's assumptions about its direction, its organization, and its cash.

A STRATEGIC PLAN – is a group's assumption about where it wants to be in the next 10-50+ years.

AN ANNUAL PLAN – is a group's assumptions about what it hopes to accomplish in the next year to move in the direction of its 10-50+ year future.

KEY ELEMENTS of a STRATEGIC PLAN

INTRODUCTION

* **Our Strategic Plan shows where we want our organization to be in 10-50 years**

Our Strategic Plan is the basis on which we decide what we do next year to move in the long-term direction.

* **Our Strategic Plan gives meaning to all we do.**

(Nothing is meaningful without a context.)

Our Strategic Plan is our organization's future context – giving meaning to every action and re-action our organization takes!

* **Our Strategic Plan is the basis for alignment and clear understanding at all levels.**

There should be alignment and understanding from our board of directors to our senior executive, our executive team, all of our newest team

members – (paid or unpaid), our donors, and even to the general public (as appropriate).

*** Our Strategic Plan helps the essence of our organization remain constant.**

This is true even if what is realistically achievable varies dramatically at each phase of development.

*** Our Strategic Plan should be reviewed once a year**

A Strategic Plan is not a weekly, monthly, or quarterly document. It is a reference document, which can be reviewed quickly once a year to see if there are any refinements which need to be made to keep it updated.

ACTION STEPS

QUALITATIVE

1. **SCRIPTURES** (5-10 foundational scriptures – the bedrock on which we are building)
2. **BELIEFS** (3-5 things our team believe in common – e.g. Nicene Creed, affiliations etc.)
3. **PURPOSE STATEMENT / MISSION STATEMENT** (A clear statement of why we exist as an organization)
4. **DREAM / VISION** (What difference we hope to make in the deep future – what do we want to influence / impact? – non-measurable – scalable)
5. **PROGRAMS** (What are the primary programs we will use to make this difference?)
6. **CORPORATE CULTURE** (5-10 foundational assumptions concerning the behavior of each team member which are key to shaping our entire corporate culture)
7. **LEGACY** (What we hope to leave to the next generations)

QUANTITATIVE

8. **THE 7 VITAL SIGNS / 5 CRITICAL STANDARDS** (*10-year priorities charted*)

- * Clarifies DIRECTION for the entire organization
- * Allows you to move from a limited year-to-year plan to a 10-YEAR PLAN
- * Allows a Strategic Plan to be QUALITATIVE AND QUANTITATIVE
- * Brings board and staff ALIGNMENT at a measurable level
(*Nothing clarifies like measurability!*)
- * Shows 50,000-foot HEALTH of the organization – year after year
- * Provides a 10-year FINANCIAL CONTEXT for annual budget preparation
(*Line items are an annual consideration and are very difficult to project into the deep future.*)

[] **Video available on BobbBiehl.com**

STRUCTURAL

9. **ORGANIZATIONAL STRUCTURE** (*Needed in the future to grow into potential*)

ACTIONABLE

10. **AGREEMENT** (*Once completed – signed by members of the board, the senior executive, and the executive team members*)