

# STRATEGIC PLANNING OVERVIEW

# Aha! Consulting

**When will you have your next Aha! moment?**

## INTRODUCTION TO PLANNING

The pace, financial and time pressure in modern organisations makes it imperative that everyone's efforts are united towards a common direction. The strategic plan provides this direction it is a defining document for your organisation, informing the long-term strategic decisions of the board and guiding the operational activities/priorities of staff.

Long term success for organisation comes from their ability to balance the time they spend focusing on strategic matters and time on operational matters. While this document focuses on Strategic planning, it is important that strategic planning doesn't happen in isolation to the Operational planning that will flow from the strategy.

Depending on the size of the organisation, where strategic and operational conversations take place can vary. Smaller organisations tend to have a closer interconnection between the strategic and operational, big organisations tend to make separate this out more clearly.

Ideally organisations have three linked documents:

	<b>Strategic Plan</b> 'doing the right things' 'making sure the boat is in the right river'	<b>Operational Plan</b> 'doing things right' 'rowing the boat'	<b>Board Plan</b> 'doing out bit' 'steering the boat'
<b>What is it?</b>	The big picture direction and purpose for the organisation.	The practical and detailed guide to achieving the strategic direction	The practical and detailed guide of the board activities beyond monitoring the ops plan
<b>Key Elements</b>	<ul style="list-style-type: none"> <li>- Articulating the Vision,</li> <li>- Mission and objectives</li> <li>- Showing the Strategies and</li> <li>- Performance Measures</li> <li>- Providing some History/context</li> </ul>	<ul style="list-style-type: none"> <li>- Converting objectives and strategies that are the staffs responsibility into actions, delegations and milestones</li> </ul>	<ul style="list-style-type: none"> <li>- Converting objectives and strategies that are the boards responsibility into actions, delegations and milestones</li> </ul>
<b>Timeframe</b>	<ul style="list-style-type: none"> <li>- 3-5 years (annual review)</li> </ul>	<ul style="list-style-type: none"> <li>- 12 months</li> </ul>	<ul style="list-style-type: none"> <li>- 12 months</li> </ul>
<b>Developed by</b>	<ul style="list-style-type: none"> <li>- Board/committee in consultation with staff and key external stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>- By CEO/Exec and staff signed off by board</li> </ul>	<ul style="list-style-type: none"> <li>- Board/committee</li> </ul>
<b>Reporting</b>	<ul style="list-style-type: none"> <li>- CEO/ED to board on aspects that have been delegated to CEO</li> <li>- Board to board on aspects that are the boards responsibility to achieve.</li> </ul>	<ul style="list-style-type: none"> <li>- Staff to CEO</li> </ul>	<ul style="list-style-type: none"> <li>- Board to board</li> </ul>
<b>Review period</b>	<ul style="list-style-type: none"> <li>- Frequency determined for each strategy and folded into Board meeting process.</li> </ul>	<ul style="list-style-type: none"> <li>- Frequency determined for each action and feeds into reporting on the strategic plan.</li> </ul>	<ul style="list-style-type: none"> <li>- Frequency determined for each action and feeds into reporting on the strategic plan.</li> </ul>

## THE STRATEGIC PLANNING PROCESS

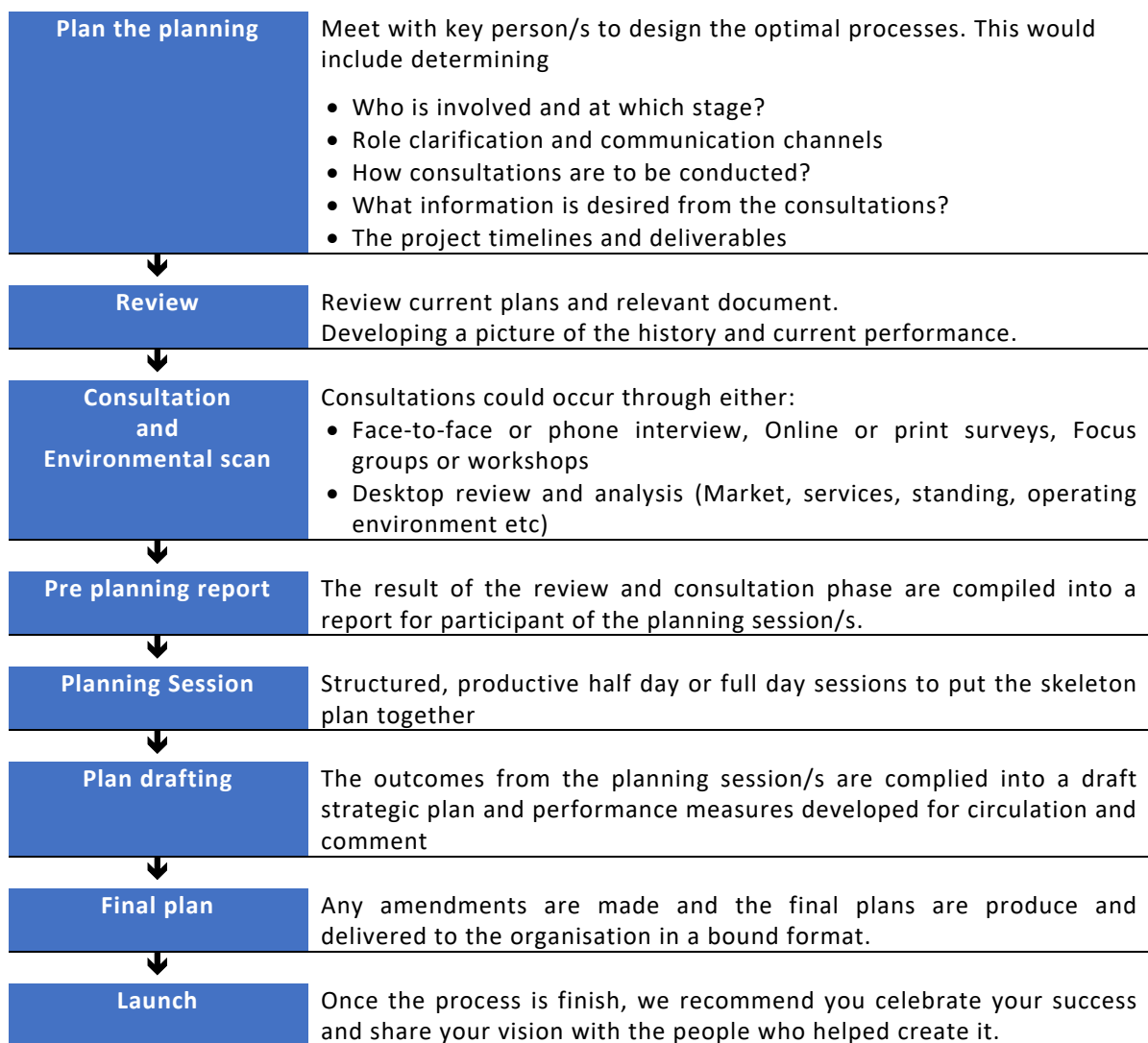
Successful strategic plans need to be living documents and as such the planning process cannot occur in isolation from the organisation. Some consultant “do planning” to an organisation. This approach is time efficient but ultimately creates a static document that is likely to gather dust on the shelf.

Successful planning allows the organisation to:

- Review where the organisation is right now
- Invite internal and external stakeholders contribute to the planning
- Consider a range of potential directions and opportunities for the future
- Identify any potential barriers to achieving this direction
- Articulate this direction in simple, accessible and measurable language
- Set a clear pathway for the conversion of the strategy into action.

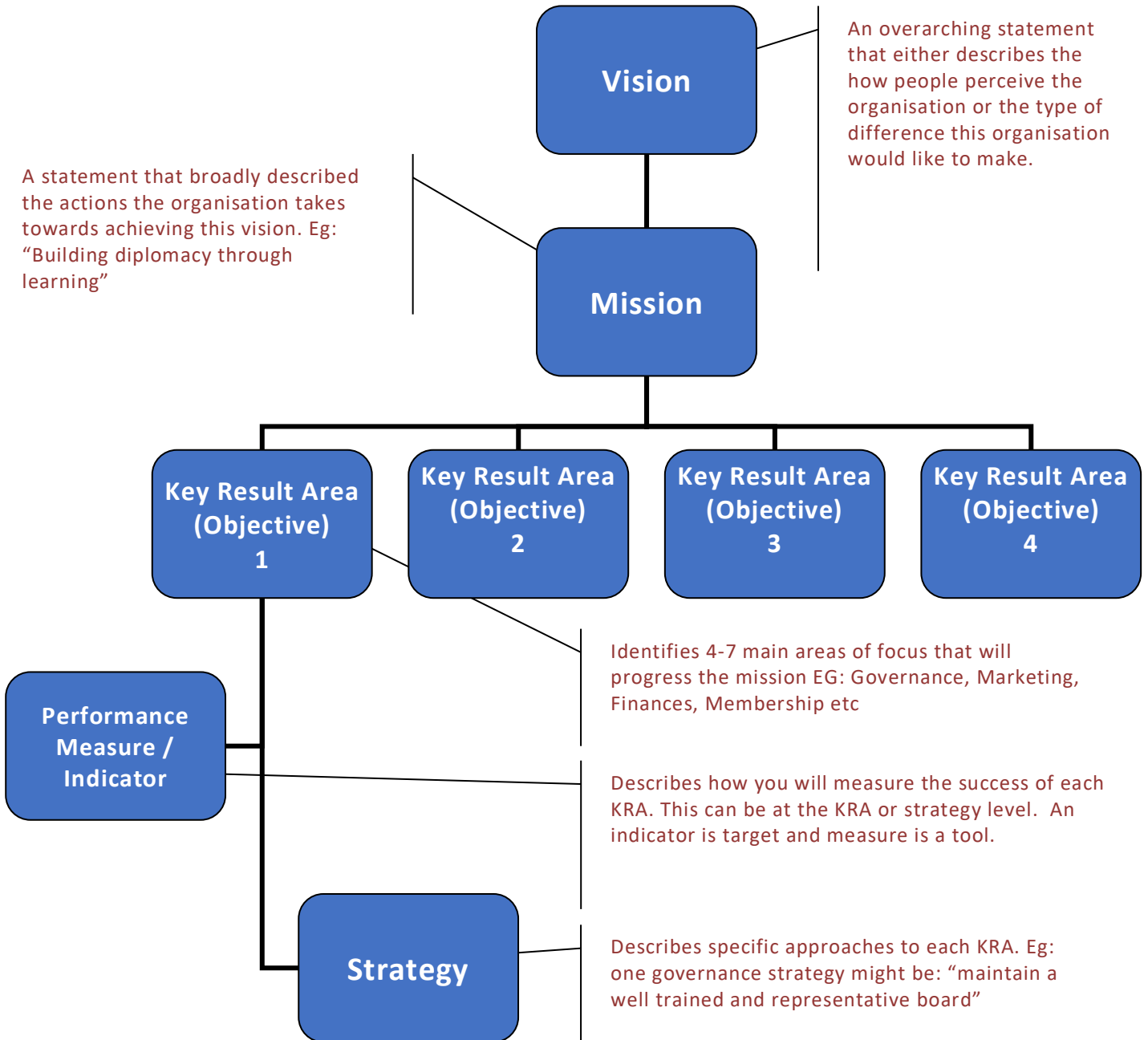
### Typical Process

A suite of techniques allows the process to be tailored to suit each organisation and each industry, however the typical planning process would consist of:



## STRATEGIC PLANNING – STRUCTURE

The strategic plan needs to be able to articulate the following elements. Some may have different terms for each level of thinking but the logic flow is the same.



### Values

Values describe "how" people in the organisation intend to undertake all of the activity described in the plan.

## TYPICAL CONTENT OF A STRATEGIC PLAN

### 1. INTRODUCTORY PAGES

- About the organisation
- Introduction from chairperson/senior staff member
- Vision mission and values
- Key result areas (KRA) / Objectives

### 2. STRATEGY PAGES

#### KRA 1) Engaged and skilled staff

Strategy	Performance Measures	Report	Who
The required tasks achieve the KRA/Objective	This describes the outcome once the strategy is completed. In most cases the measure should generate a yes/no answer or provide data  “What will be seen as a result of the work?”	Frequency of reporting	
1.1 Be the go to place for employment in this sector	% change in staff turn over % change in culture survey results Time to fill positions	Half year	CEO

### 3. HISTORY

- A brief outline of the organisations history, success and other aspects of the organisations make up.

### 4. OPERATING CONTEXT

- A summary of the operating environment and potential barriers and enablers

## WHO IS AHA! CONSULTING?

Based in Western Australia, Aha! Consulting has over fifteen years' experience in Strategy, Engagement, Facilitation and Evaluation. We are privileged to have clients from a diverse range of sectors, organisational sizes and service needs. We enjoy positive long-term relationships with our clients, some of which have extended into many years of ongoing collaboration.

We work hard to maintain our track record and reputation for delivering high quality services across Australia and, more recently, internationally with the United Nations.

As a small consulting firm, our systems are simple, efficient and focussed on clarity and quality of communication for staff and clients. We are small enough to be cost-effective and responsive, yet have the required depth to manage contingencies and ensure there is continuity of service and a timely delivery of project outcomes.

Our lead consultant, Joel Levin, has the support of a pre-existing team of sub-contractors who know how to work together and have consistently delivered quality outcomes in a timely manner. We have virtual tools and communication systems that allow for the seamless management of shared tasks and responsibilities.

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