

Creating A
Strategic Plan

ManagementXP



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Introduction

Strategic planning is a core management function that defines the direction and scope of an organisation over a medium-to-long term (typically 3 to 5 years). This guide outlines a systematic process for clarifying your organisation's purpose, setting priorities, and establishing concrete, measurable goals for future development.

Understanding Strategic Planning

Strategic planning is the process of:

- Clarifying what the organisation is about.
- Deciding what is and is not a priority in resource allocation.
- Analysing both internal and external factors.
- Preparing for upcoming changes and transitions.
- Setting a clear direction and concrete goals.

This comprehensive process ensures that the organisation's long-term vision is supported by well-defined strategies and actionable steps.

Developing Your Strategic Plan

1 Involving Stakeholders

Determine **who** should be involved and **when**:

- **Implementation Team:** Managers, staff, volunteers.
- **Affected Parties:** Members, users, or beneficiaries.
- **Oversight:** Those responsible for monitoring progress.
- **Additional Contributors:** Community activists, funding bodies, etc.

Methods for engagement may include:

- Open days with multiple workshops.
- Targeted consultation meetings.
- Written submissions via questionnaires.
- Forming a diverse steering group.

2 Analysing the Organisation's Current Position

Before planning for the future, develop a shared understanding of the current state.

2.1 External and Internal Environment (SWOT Analysis)

Use a SWOT analysis to assess:

- **Strengths (Internal):** What the organisation does well.
- **Weaknesses (Internal):** Areas that need improvement.
- **Opportunities (External):** Trends and events that could benefit the organisation.
- **Threats (External):** External challenges that might impede progress.

2.2 Reviewing Vision, Mission and Values

Based on your SWOT findings, review or redefine:

- **Vision:** The long-term aspiration of the organisation.
- **Mission:** The core purpose and primary objectives.
- **Values:** Guiding principles that influence culture and decision-making.

3 Defining Future Priorities and Strategic Aims

After understanding the current position:

- **Set Priorities:** Identify the main areas of focus emerging from your SWOT analysis.
- **Establish Strategic Aims:** Define broad, measurable goals (ideally 4 to 10) that support the mission.

4 Charting the Route Forward

Plan how to bridge the gap between the present state and your strategic aims:

4.1 **Setting SMART Objectives:** Objectives should be Specific, Measurable, Achievable, Realistic, and Time-bound.

- Define the impact you want to make and the timeline.

4.2 **Resourcing:** Assess available resources (human, physical, financial) and identify gaps.

4.3 **Operational/Work Plans:** Develop detailed action plans outlining:

- What needs to be done.
- Who is responsible.
- Required resources.
- Success criteria and target outcomes.

4.4 **Structures and Systems:** Ensure organisational structures and governance are aligned to support the plan. Review roles, policies, and training needs.

Documenting the Strategic Plan

Create a written document that serves as a reference and communication tool.

Suggested content structure:

- **Executive Summary:** A brief overview that can also be shared externally.
- **Introduction:** Background information and purpose of the plan.
- **Purpose:** Updated mission, vision, and values.
- **Internal Appraisal:** Summary of current strengths, weaknesses, and governance.
- **Future Potential:** Outline external challenges and opportunities.
- **Strategic Aims and Priorities:** Detailed objectives for the next 3 to 5 years, including tasks and outcomes.
- **Delivery Plan:** Resource allocation, budget, and timeline.
- **Governance:** Controls and management structures.

Monitoring and Reviewing the Plan

Ongoing evaluation is crucial to ensure progress:

- **Regular Reviews:** Compare operational plans against the strategic aims.
- **Performance Measures:** Define key indicators (KPIs) to track progress.
- **Feedback Loops:** Establish systems to adjust objectives as internal and external conditions change.

Additional Planning Documents

In support of your strategic plan, consider developing:

- **Operational Plans:** Detailed annual work plans that support the strategic objectives.
- **Business Plans:** Financial and operational details projecting resource management over a 3-year period.
- **Development Plans:** For early-stage organisations or new initiatives (typically 1–3 years).
- **Project Plans:** Specific plans for defined projects with set timeframes (1–3 years).

Tools and Templates

To facilitate the planning process, use the following resources:

- **SWOT Analysis Template:** For structured internal/external reviews.
- **Strategic Planning Checklist:** To ensure all steps are completed.
- **SMART Objectives Worksheet:** To guide objective setting.
- **Operational Plan Template:** For detailing day-to-day activities and responsibilities.



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