

STRATEGIC PLANNING BASICS



We need to stop planning for calm seas and start building ships that can steer through the waves.



Culture—not operations, partnerships, or resources—is the biggest differentiator between teams that sink and those that swim when the water gets rough. Organizations need agile strategies and operations, but culture is the critical infrastructure that determines whether your organization can develop and execute that agility.



A ROAD MAP

- **Connect strategic goals to execution with clear roadmaps that maintain organizational alignment and focus**



THE BUSINESS

- Optimize investments across both run-the-business and change-the-business initiatives to generate maximum value.



ADAPTIVE

- Build an adaptive plan that can pivot quickly when market conditions change, ensuring sustained competitive advantage



BIG PICTURE

- **Define Mission, Vision, and Values:** Determine why the organization exists (mission), where it wants to be (vision), and the core values guiding it.
- **Conduct a Situational Analysis (SWOT):** Identify internal strengths and weaknesses, and external opportunities and threats (SWOT analysis).
- **Set Strategic Goals and Objectives:** Define clear, actionable, and measurable goals that align with the mission.
- **Develop Action Plans:** Outline specific steps, tasks, responsibilities, and timelines to achieve the goals.
- **Monitor, Review, and Adapt:** Track progress using KPIs (Key Performance Indicators) and adjust strategies as needed.



MODELS

Several models you may encounter are focused on laying out a clear and distinct process. For example:

- ***Classic Model:*** Also called the basic or simple model, this method lays out five clear steps. The process begins with refining your **mission statement**, then helps you articulate long-term goals, design strategies to achieve those goals, create action plans to put those strategies into action, and establish tools to monitor progress.
- ***Issue-based Model:*** Also called a goal-based model, this approach **builds on the classic model by adding** in tools like an environmental scan or SWOT analysis. These help organizations identify internal and external strengths, weaknesses, opportunities and threats.
- ***Alignment Model:*** This model adds a deeper **focus on internal operations**, ensuring that internal processes and technology are aligned to support an organization's strategic goals.



MORE MODELS

- ***Inspirational Model:*** The inspirational model starts with vision and inspiration. Stakeholders are encouraged to think big and bold. **You first envision the future you want to achieve**, then figure out how to get there.
- ***Balanced Scorecard:*** This approach was originally designed to help companies measure impact beyond financial performance. The scorecard is a structured format that guides businesses in setting goals and outcomes related to finances, customers and clients, internal processes, and organizational capacity.
- ***Porter's Five Forces:*** Also focused on the for-profit sector, Porter's Five Forces model is all about identifying and assessing the "five factors" that influence the profitability of your company's products and services.



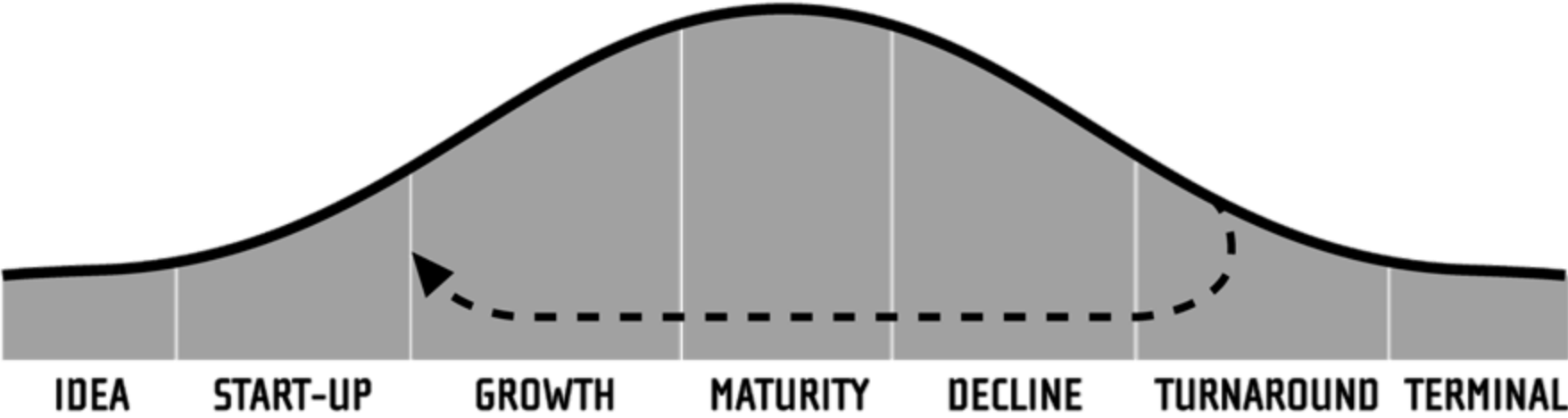
NONPROFIT LIFECYCLES MODEL

- A diagnostic tool that maps an organization's development across seven, non-linear stages—Idea, Start-up, Growth, Maturity, Decline, Turnaround, and Terminal—to identify appropriate capacity-building needs. It helps leaders align, or "right-size," their operations in five key areas (programs, management, governance, resources, and systems)
- Developed by Dr. Susan Kenny Stevens





NPL STAGES



	IDEA	START-UP	GROWTH	MATURITY	DECLINE	TURNAROUND	TERMINAL
<i>Life Cycle Stage</i>	→	→	→	→	→	→	→
Programs	→	→	→	→	→	→	→
Management	→	→	→	→	→	→	→
Governance	→	→	→	→	→	→	→
Financial Resources	→	→	→	→	→	→	→
Administrative Systems	→	→	→	→	→	→	→



NPL — CORE PRINCIPLES

- **Not Sequential:** Organizations do not have to move linearly through stages ; they can skip stages or get stuck in one for years.
- **Capacity-Based :** The focus is on aligning capacity (or Table Legs like governance, management and finance) with the current stage.
- **Diagnostic Tool:** Used to identify if an organization is over- or under-performing for its current stage, helping to prevent burnout or stagnation.



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BECOMES A GOAL. A GOAL BROKEN DOWN
INTO STEPS BECOMES A PLAN. A PLAN BACKED
BY ACTION MAKES YOUR DREAMS COME
TRUE.”**

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