Strategic Planning in Your Organization

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presented by

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Mission

To help individuals, businesses and organizations find clarity and create a plan to move from where they are to where they want to be.

- **Fashion Artist** - Designs for artists, Red Carpet events, and special occasions
- **Dancer** – Ballet, Jazz, Hip Hop, West African, Modern styles

- **30+ years of experience** with Government, Non-Profit, & Private Sector organizations
- **Strategic planning & implementation, change management, communication**
- **Certified** Balanced Scorecard Master Professional, Key Performance Indicator Professional, Certified Public Official, Cal State San Bernardino Alumni
• Top Project Management Challenges
• Benefits of Strategic Planning
• Strategic Plan Blueprint
Gallup Poll Study
2.5% of companies successfully complete 100% of their projects.

PMI Research
For every $1B invested in the US, $122M was wasted due to lacking project planning and performance.
Top Challenges

- Unclear Goals
- Inadequate Communication
- Misestimating Expenses
- Risk Management
- Unrealistic Deadlines

Based on research and findings by research giants, such as PMI, Gallup, Deloitte, Gartner, LiquidPlanner
<table>
<thead>
<tr>
<th>Top Challenges</th>
<th>Strategic Planning in Your Organization</th>
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<tbody>
<tr>
<td><strong>Goals</strong></td>
<td>Clear objectives and milestones to measure progress.</td>
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<tr>
<td><strong>Communication</strong></td>
<td>Untimely and lacks project status details</td>
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<td><strong>Expenses</strong></td>
<td>Budgeting issues delay project implementation</td>
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<td><strong>Risks</strong></td>
<td>No risk management strategies</td>
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<td><strong>Deadlines</strong></td>
<td>Too many priorities, missed deadlines</td>
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What’s the Solution

Stop juggling too many tasks

TO-DO LIST:
1. Everything
2. 
3.

PRIORITIES:
1. Too Many!
2.
3.
## Benefits of Strategic Planning

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Strategic Planning</th>
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<tbody>
<tr>
<td>Unclear Goals</td>
<td>Clarity</td>
</tr>
<tr>
<td></td>
<td>Sense of Direction</td>
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<td>Clearly defined Measurable Outcomes</td>
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<tr>
<td>Inadequate Communication</td>
<td>Everyone Knows the Vision</td>
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<td></td>
<td>Organization Alignment</td>
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<td></td>
<td>Connect Dots between Vision &amp; Actions</td>
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<td>Misestimating Expenses</td>
<td>Initiative Prioritization</td>
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<td></td>
<td>Performance Measures</td>
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<td>Risk Management</td>
<td>Assessment</td>
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<td>SWOT Analysis</td>
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<td>Unrealistic Deadlines</td>
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Benefits of Strategic Planning

Where We Are:

Where We Want to Be:
Strategic Planning Terms

Traditional Plans
Focus on **Outputs**
Lacks Focus
Many Objectives
Adds to Workload

Strategic Plans
Focus on **Outcomes**
Focused
Fewer Objectives
Aligns Current Workload

Balanced Scorecard
**Customer** (Benefits they See)
**Finance** (Managing Resources)
**Process** (How you do things)
**Capacity** (What you Need)
The Parts of the System

- Strategic Plan
- Communication
- Change Management
- Alignment

Strategic Planning in Your Organization

- Organization
- Departments
- Individuals
- To Do
Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.
Strategic Planning Blueprint

ASSESSMENT  STRATEGY DEVELOPMENT  STRATEGIC MEASURES  STRATEGIC INITIATIVES  ALIGNMENT  EVALUATION

Strategic Planning in Your Organization
ASSESSMENT

- SWOT – Strengths, Weaknesses, Opportunities, Threats
- Market Research
- Customer Value Proposition
Strategic Planning Blueprint

STRATEGY DEVELOPMENT
- Strategic Focus Areas
- Objectives and Intended Results
- Strategy Map
STRATEGIC MEASURES
• Strategic Measures
• Measure progress towards Intended Results
• Monthly, Quarterly, Bi-Annual
Strategic Planning Blueprint

Strategic Planning in Your Organization

ASSESSMENT  STRATEGY DEVELOPMENT  STRATEGIC MEASURES  STRATEGIC INITIATIVES  ALIGNMENT  EVALUATION

STRATEGIC INITIATIVES
• Activities, Projects, Programs
• Have a Beginning and End
• Managed like projects (Scope, Budget, Time)
ALIGNMENT
• Integrates organization-wide strategy
• Strategic plans for Business Units
• Personal objectives for Employees
Strategic Planning Blueprint

Strategic Planning in Your Organization

ASSESSMENT  STRATEGY DEVELOPMENT  STRATEGIC MEASURES  STRATEGIC INITIATIVES  ALIGNMENT  EVALUATION

EVALUATION
• Strategic Plan meetings
• Annual review of Strategy
• Adjust Strategic Initiatives as necessary
Questions...

Strategic Planning in Your Organization