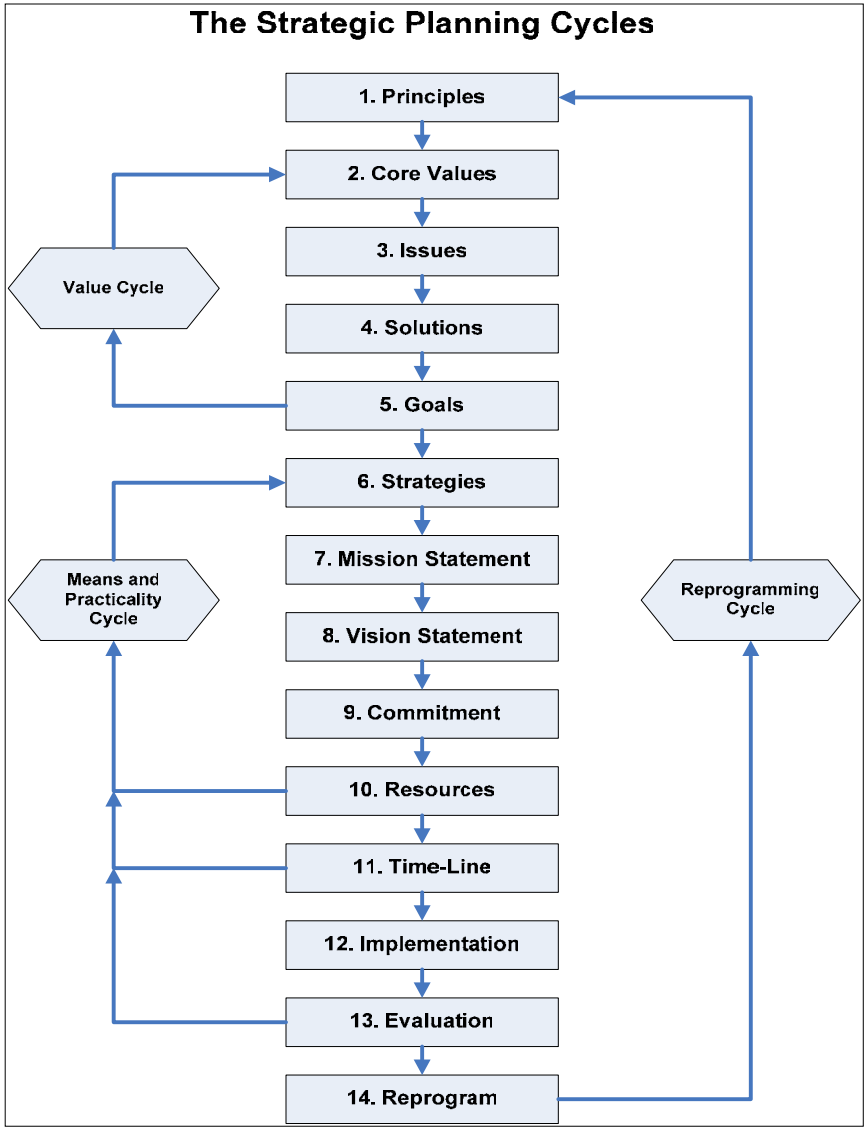
RETURN to MAIN MENU



The Strategic Planning Process

1. Specify and rank your basic PRINCIPLES. As defined in the dictionary, a principle is, "comprehensive and fundamental law, doctrine, or assumption", a "rule or code of conduct", or a "habitual devotion to right principles". Principles may be global in nature, or they may be categorized (see above). For a personal plan, these categories may be defined as - spirit, mind, and body.

2. Establish CORE VALUES from the Principles and prioritize them as to importance. Often a Background section or some History acts as a preface to this planning component. Core values often begin with the words "We believe…", or "We affirm…", or "We value…"

3. Find your ISSUES or problems that need work (Prioritize). These may be Challenges or Barriers to a Value or Principle. Find your ISSUES or problems that need work and prioritize them. This process may involve some frank and open discussion between team members. The facilitator needs to encourage and control this process, preventing it from getting too, "out of hand".

4. Devise SOLUTIONS or resolutions to the Issues. This process is often referred to as remediation or resolution. Devise well conceived solutions or resolutions to the Issues that help develop the next goal setting process. Solutions may be listed under each issue.

5. Set and Prioritize GOALS. Goals are seen better after developing values and attempting to resolve issues. Often goals are broken into lists of, long range, short term, and immediate. Prioritization is also very important in this process. Goals may be also subdivided into objectives. An objective better defines a goal, but be careful, in the true strategic planning process, the strategy (below) typically replaces this objective step, and better defines the goal and its implementation programs.

6. Define STRATEGIES that attempt to implement each Goal (Prioritize under each Goal). A strategy may include tasks or other scopes of work, under each strategy. Strategies used to be called objectives, but an objective is commonly merely a sub-set of a goal, not a real and usable strategy. Define properly STRATEGIES that Implement each Goal and prioritize the same under each goal. Strategies may have tasks or additional scope listed under each of them. Strategies or tasks may be also further categorized as: 1. Policies (rules or laws), 2. Programs (a single or recurring event), 3. Projects (a "brick and mortar" type project), 4. Plans (further planning), or 5. a Purchase (of some asset or material).

7. Create a MISSION STATEMENT that becomes the Primary or Overall Goal. This is easier after developing the goals, and becomes in essence, a "primary" or "summary" goal.

8. Create a VISION STATEMENT that is the Dream or the Future Success of the company. This task is developed more from the ratified Core Values.

9. COMMITMENT is an action to implement the Strategies listed above in a planned out and realistic order. In this section is listed any Projects or Events needed to meet the Goals or Strategies. These tasks may also be categorized as: 1. Policies (rules or laws), 2. Programs (a single or recurring event), 3. Projects (a "brick and mortar" type project), 4. Plans (further planning), or 5. Purchase (of some asset or material). Commitment may also require some time and capital. This task may be simply be a statement or paragraph, demonstrating the means or endeavor of the entity and an agreement to accomplish the strategies outlined above.

10. RESOURCES Itemizes the costs of the projects and events in the Commitment (if applicable) and creates a BUDGET of funds, time, man power, or other resources, needed to implement the strategies. (Often this step requires a "revisit" of the Strategies and Projects if the Budget does not allow for reasonable or practical success).

11. Develop a TIME LINE or calendar for any applicable Projects and Events.

12. IMPLEMENT the Plans and Strategies, according to the schedule developed above and availability of resources

13. Review and EVALUATE the success or short comings of the Plan regularly.

14. REPROGRAM or "tweak" the Plan as needed. This may be the most important step – and ensures that the plan remains workable and dynamic. Set regular or annual re-evaluation and update sessions, to further the goal (which should be included in the plan) of a dynamic and usable strategy.

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