



## STEPS FOR SUCCESSFUL STRATEGIC PLANNING USING THE WALTERS INFINITE CIRCULAR PLANNING FRAMEWORK<sup>1</sup>

### PRIOR TO THE STRATEGIC PLANNING MEETING

1. Determine the participants involved in the strategic planning meeting.
2. Determine a timeline and budget for the planning process.
3. Committees and others responsible for programs will use the Committee Activity Evaluation & Recommendation Form<sup>2</sup> to evaluate each of their action items and make recommendations to either: (A) Propose a new activity, (B) Keep the activity as is, (C) Keep the activity but make specific modifications, or (D) Discontinue activity.
4. Ask constituents and stakeholders for their opinions and ideas (use an electronic questionnaire).
5. Compile results of the questionnaire and gather the Committee Activity Evaluation & Recommendation Forms. Distribute questionnaire results and the results of the Committee Activity Evaluation & Recommendation Forms to the strategic planning meeting participants.

### DURING THE STRATEGIC PLANNING MEETING

6. Determine / Reaffirm / Modify the organization's purpose (or mission) statement:
  - Why the organization exists.
  - Identify the global needs of the customer / community / profession / industry.
7. Review and discuss the constituent and stakeholder questionnaire results. Review and discuss the committee activity evaluations and recommendations.
8. Identify internal and external assessments - what's going on?
  - Identify SWOTs: Strengths, Weaknesses, Opportunities, and Threats.
9. Identify, list and prioritize the major issues facing the organization in the near term (2-3 years).
10. Identify goals the organization must reach to accomplish its purpose.
11. Establish strategies to address major issues and goals: objectives/targets, actions, resource needs, timelines, roles and responsibilities.

### AFTER THE STRATEGIC PLANNING MEETING

12. Create the written document (this ensures accountability, eliminates unintentional activity drift, tracks progress, records results, and communicates status to stakeholders).
13. Align the strategic plan and the budget: allocate resources for programs, operations, staffing.
14. Expect the Board of Directors, committees and staff to use the strategic plan as the guide for their responsibilities and work, and as a reporting mechanism of their progress.
15. Review / Modify the strategic plan and the progress that has been made.

<sup>1</sup> Click here for the Walters Infinite Circular Planning Framework at [www.theleadershipcenter.com](http://www.theleadershipcenter.com)

<sup>2</sup> Click here for the Committee Activity Evaluation & Recommendation Form at [www.theleadershipcenter.com](http://www.theleadershipcenter.com)