



Strategic Planning Overview

MARCH 3, 2018

Why Plan?

- ▶ Get Everyone on the Same Page
 - ▶ Encourage Us to Act Strategically
 - ▶ Save Cost, Time, Aggravation
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- ▶ Someone says you should!!!

Formal Types of Planning

- ▶ Formal Plans
 - ▶ Conventional Planning Process
 - ▶ Balanced Scorecard Model
 - ▶ SWOT Analysis
 - ▶ PEST Model (Political, Economic, Sociocultural, Technological)
 - ▶ GAP Planning

But...

- ▶ Do we have the time?
- ▶ Do we have the control?
- ▶ Do we have the desire/will?

- ▶ Will we maintain it?

So...Informal Planning

- ▶ The Key Elements
 - ▶ Vision Statement
 - ▶ Core Values
 - ▶ Internal Environment
 - ▶ External Environment
 - ▶ Action Plans

Vision Statements

- ▶ Aspirational and Hopeful
- ▶ Forward-Looking
- ▶ Powerful Verbs

Sample Vision!

- ▶ By 2020, we will be recognized as the world's most innovative car company and a leading light in sustainability.

Sample Vision!

- ▶ To Make the World Happy

Core Values

- ▶ What are your Beliefs?
- ▶ How do your Team Members Behave?
- ▶ What should your customers expect?

Sample Core Values

- ▶ Southwest Airlines
- ▶ Ben & Jerry's

Internal Environment

- ▶ Staffing
- ▶ Facilities
- ▶ Services
- ▶ Processes and Procedures

External Environment

- ▶ Political
- ▶ Economic
- ▶ Demographic
- ▶ Cultural

Action Plans

- ▶ Determine a Timeframe
- ▶ Determine WHO will do it?
- ▶ Determine the Measurement (How will you know it is done well?)

Sample Plan

- ▶ Our Assistant Treasurer is going to develop a new training manual for new hires by December 2018. This training manual needs to be approved by the County Treasurer by September 2018.

After The Process

- ▶ Who is going to oversee the results?
- ▶ How do we handle turnover/changes?
- ▶ How often should we re-visit it?