

Strategic Planning Journey **CHECKLIST**

FROM READINESS TO RESULTS | ENGAGEMENT ROADMAP

1. START – BUILD THE FOUNDATION FOR SUCCESS

FOCUS: Preparation and assessment

- ☐ Define mission, vision, and values: Ensure foundational statements are relevant and clearly understood.
- ☐ Assess internal and external environment: Conduct SWOT and PESTLE analyses.
- ☐ Identify strategic alternatives: Explore growth paths, partnerships, and evaluate risks/benefits.
- ☐ Check organizational readiness: Confirm leadership alignment and change readiness.
- ☐ Establish the planning structure: Assign roles, responsibilities, and form a planning team.

2. PROCESS – PLAN WITH PURPOSE & PRECISION

FOCUS: Planning and goal setting

- ☐ Outline strategic objectives: Use SMART criteria to break down goals.
- ☐ Set strategic goals: Define long-term aspirations.
- ☐ Develop an action plan: Map initiatives and tasks for each objective.
- ☐ Determine budget and timeline: Allocate resources and set deadlines.
- ☐ Identify key performance indicators (KPIs): Choose metrics to track success.

3. SHARE – COMMUNICATE AND ALIGN ACROSS YOUR ORGANIZATION

FOCUS: Engagement and alignment

- ☐ Communicate the plan: Share with all departments and stakeholders.
- ☐ Create feedback channels: Enable input and dialogue across teams.
- ☐ Align leadership and staff: Ensure everyone understands their role in execution.
- ☐ Promote strategic clarity: Reinforce the “why” behind the plan.

FLIP THE PAGE TO COMPLETE THE NEXT STEPS AND KEEP YOUR PROGRESS ON TRACK!



4. GAIN – EXPERIENCE STRATEGIC CLARITY AND CONFIDENCE

FOCUS: Execution and value realization

- ☐ Implement the plan: Activate initiatives and monitor alignment.
- ☐ Track progress: Use KPIs to review monthly or quarterly performance.
- ☐ Celebrate milestones: Recognize achievements to build momentum.
- ☐ Empower decision-making: Use data to guide adjustments and resource shifts.

5. RESULTS – ACHIEVE MEASURABLE IMPACT

FOCUS: Monitoring and continuous improvement

- ☐ Review and adapt: Reassess strategy periodically and refine as needed.
- ☐ Manage performance: Evaluate outcomes and optimize execution.
- ☐ Report outcomes: Share impact with stakeholders and funders.
- ☐ Integrate feedback: Use insights to inform future planning cycles.

6. EVALUATE & REPORT OUTCOMES AND COMMUNICATE SUCCESS

FOCUS: Documentation and revision based on strengths

- ☐ Conduct formal evaluation: Assess impact against original goals and objectives.
- ☐ Document outcomes: Create reports for leadership, funders, and stakeholders.
- ☐ Share success stories: Highlight achievements to build credibility and morale.
- ☐ Benchmark performance: Compare results with industry standards or peers.

7. SUSTAIN & REVISE PERIODICALLY

FOCUS: Keeping strategy in front at all times

- ☐ Review and revise our strategic plan annually.
- ☐ Embed strategy into culture: Ensure planning becomes part of daily operations.
- ☐ Invest in leadership development: Build skills for future strategic cycles.
- ☐ Plan for succession: Ensure continuity of vision and execution.
- ☐ Secure resources: Identify long-term funding and partnerships to sustain impact.

