Strategic Planning

CREATING VALUE IN THE STRATEGIC PLANNING PROCESS
What does your current SP process look like?

- Frequency?
- Participation?
- Measurability?
- Quality?
- Moderator?
- Length of event?
Why are you here?

- What problems are you looking to solve?
- What are you looking to improve?
- What do you want to walk away with?
Why?
- Ineffective
- Long process (with volunteers)
- Not measurable
- Same goals year after year
- Lack of clear direction
- Unrealistic
- Non existent
Prepare

Strategic planning is an on-going process – prepare material for the SP session all year long

- Event data document
- SP updates at Board meetings
- Ongoing SP evaluations/updates
- SP annual evaluation
- Share with members
- Discuss at staff meetings
- The marker board
- Staff recommendations
- Member survey results (The Ultimate Question)
Strategic Planning (the actual day of planning)

- Short and sweet! (completely possible if the prep work has been done all year leading up to this point in time)
- Write the Chamber’s MISSION STATEMENT clearly for all participants to see
- Present all materials in advance
- Agenda:
  - Introduction of the process and resources/tools available
  - Evaluate last year (staff present evaluation to Board)
  - Explore the data and staff recommendations
  - Add other ideas, discuss (including marker board ideas)
  - FIND PATTERNS (grow strengths, eliminate/change areas that are weak)
- Hire someone or not?
- Staff present or not?
- Who takes notes?
Follow Up: What happens next?

- Your strategic planning session doesn’t end with the actual written plan
- Staff (or your facilitator) will take the discussion and information back to wherever he/she takes it and creates a draft plan based on resources, reality, discussion
- Present the draft plan at the next Board meeting/with staff
- Discuss and adopt
- Share with members
When this happens, squash it

- Off topic
- Too much chatter
- Too big of a plan
- Ideas that don’t fit within the mission
- Participants who would rather be elsewhere, or don’t show up at all
- The squirm
- Domination
- Saving Santa Claus
WHY this works

- Succinct
- Is an effective use of time AND creates an effective plan
- Easy to understand and explain the process and product
- Easy to measure
- Easy to update members
- Fits the mission
- Strong and valuable
Questions