Strategic Planning

NYAIL 2013 Statewide Conference
Hilton Garden Inn & The Rensselaer Banquet and Conference Facility
Troy, New York

Facilitated By:
MCS, Inc.
Edward L. McCormick
President & CEO
V.M.O.S.A.

A practical strategic planning process; that provides a Blueprint of positive outcomes for your community:

- Vision
- Mission
- Objectives
- Strategies
- Action Plans
An important part of success begins with strategic planning. A strategic plan is a road map or course of action to achieve desired results. When you develop a strategic plan it should embrace your Vision and Values.
WHAT IS STRATEGIC PLANNING?

Strategic planning is an organizational management activity used to:

✓ Set priorities
✓ Focus energy/resources
✓ Strengthen operations
✓ Ensure employees/stakeholders are working toward same goals
✓ Establish agreement around intended outcomes/results
✓ Assess/adjusts the organization's direction in response to change
STRATEGIC PLANNING – WHY?

- Basis for accountability
- Stimulus for change
- Strategic planning: Why do it?
- Set long term direction
- Framework for decision making
- Foundation for operational planning
- Explain business to others
WHAT IS A STRATEGIC PLAN?

A strategic plan is:
• A document used to communicate the organizations Goals
• Actions needed to achieve those goals
• All other critical elements developed during the planning exercise.
STRATEGIC PLAN UTILIZATION

• Create public value at a reasonable cost
• Improve decision making and action in order to enhance organization’s overall effectiveness
• Ensure mandates are met and stakeholders are satisfied
• Develop and refine your vision for the future
• To foster an organization of “Strategic Thinkers”
STRATEGIC PLAN-CONTENTS

Strategic plans: What do they contain?

- Vision
  - Where are we going?
    - Size
    - Market share
    - Product mix

- Mission
  - What do we do?
    - Products or services
    - Customers or beneficiaries
    - Market niche

- Values
  - Why do we do it?
    - Making a difference

- Objectives
  - What do we plan to achieve?
    - Results
      - Expectations
      - Requirements

- Strategies
  - How can we measure our progress?
    - Quantifiable
    - Consistent
    - Realistic
    - Achievable

  - How will we act on our plans?
    - Rules and guidelines
      - Diversification
      - Growth
      - Acquisition
      - Use SWOT analysis to identify

  - Strategic plans: What do they contain?

Picture from Novamind.com
SWOT Analysis

Strengths:
- Our advantages
- Assets
- Resources

Weaknesses:
- External criticism
- Vulnerabilities
- Known
- Trends

Opportunities:
- Environmental changes
- New products
- New technologies

Threats:
- External roadblocks
- Marketplace changes
- Economic conditions

SWOT:
- Sales
- Management
- Operations
- Products
- Finances

Systems
- Marketing
- Distribution
- Promotion
- Support

Efficiency
- Capacity
- Processes

Services
- Quality
- Pricing
- Features
- Range

Competitiveness
- Resources
- Performance

R&D
- Effort
- Direction
- Resources

Productivity
- Purchasing
- Organization
- Structures
VISIONING

• By developing a vision statement, your organization makes the beliefs and governing principles of your organization clear to the greater community (as well as to your own staff, participants, and volunteers).
VISIONING

In general, vision statements should be:

• Understood and shared by members of the community
• Broad enough to encompass a variety of local perspectives
• Inspiring and uplifting to everyone involved in your effort
• Easy to communicate
VISIONARY THINKING

• Drives Organizations to Greatness
• Stimulates Thinking Strategically
• Limits Tactical Thinking That Supports the Status Quo
• Create Opportunities for Future Growth
• Expand Organizational Deliverables

** It is critical that the organization agree on the VISION, to navigate the future **
MISSION

Developing *mission statements* is the next step in strategic planning

- An organization's *mission statement* describes *what* the group is going to do, and *why* it's going to do that.
THE TEN VALUES OF HIGH PERFORMING COMPANIES

1. Unquestioned Integrity
2. We are a team
3. We value humility…ego trips are not allowed
4. Innovation is the rule
5. You are empowered to fix what’s broken
6. Everyone is accountable to our values
7. We have fun!
8. Seek the best for others
9. Transparency
10. Exceptional is always the goal

Jim Underwood *The Invisible Wall*
Mission statements are similar to vision statements, but they're more concrete, and they are definitely more “action-oriented” than vision statements.

**Statements should be:**

- Concise
- Outcome-oriented.
- Inclusive
DEVELOPING STRATEGIC OBJECTIVES

With a Focus On:

1) Environmental Impacts
   - Internal/External
2) Values/Beliefs
3) Critical Issues
4) GAP Analysis
5) Strategic Objectives
ACTION PLAN

Action plan steps:

• Designate person(s) responsible: Who will do what
• Date to be completed: each action step
• Resources/Support required: what is needed and available
• Barriers or resistance, and a plan to overcome them!
• Collaborators: Who else should know about this action
“Good to Great!”

Collin’s 5 Principle’s

1) Define Greatness and Pursue It.  
2) Demand Levels – 5 Leaders.

3) Get the Right People on the Bus.

4) Follow the “Hedge Hog’s” Lead.  
5) Develop a Flywheel Mentality.
For More Information Please Contact:

McCormick Consulting Services
P.O. Box 3207
Poughkeepsie, NY 12603
(P) 845-485-1502
(F) 845-485-1501
(E) office@mcccsi.com
Website: www.mcccsi.com