



# Keep Your Strategic Plan Alive

Strategic planning is an investment in your organization. This is because people spend time, effort and money developing the plan. Too often, however, we hear about strategic plans that are created but not implemented.

**Here are some ideas for building upon the momentum, collaboration and excitement generated at your planning retreat that will keep your plan active rather than stuck on a shelf.**

**1. Task a strategic planning core team with populating a strategic planning template using information captured at the retreat.**

- Make sure your goals are S.M.A.R.T.: specific, measurable, achievable, realistic and time-bound.
- Be very realistic about an achievable 3-year timeline and how you assign task leaders. Consider leaders' interests, strengths and their ability to devote time to their assigned tasks when asking them to be involved.
- Less is more! There's no room for fluff in your plan. Make sure each task earns a place in your plan, deserves your attention and will have a measurable impact.
- Don't try to develop "the perfect plan." Rather, create a plan that is realistic and will move you forward, increasing impact through specific activities intended to meet your goals.

**2. Beware of a top-down approach. Involve enough people as will be helpful but not cumbersome.**

- One person dictating a plan to a group is not as effective as a group working on a plan collaboratively. Working as a group provides more hands to deliver the plan and more energy around it than a maverick trying to do it all.
- Some tasks are better suited for one person working on it alone at first. Other tasks, like brainstorming or putting together an interdepartmental plan, require group input. Do what makes the most sense for each task.
- Regular check-ins and reports are essential. The more people you have delivering tasks from the plan, the more you'll need to monitor progress and hold each other accountable to your set timelines.

**3. Finalize the plan and present it in a formal, public way as determined by your strategic planning core team.**

- Spreading the word about the plan increases the social expectation that you will deliver on it, making it more likely that you will adopt and implement it.
- Presenting the plan also keeps stakeholders informed, engaged and invested in your organization and in the strategic plan. It validates their work and input at the retreat and invites their continued involvement.

**4. Keep the plan visible. Literally!**

- Once you've finalized and presented your plan, print it out and hang it on the wall in your office or conference room. Having it front-and-center makes it impossible to ignore!

**5. Recruit an accountability partner who will track outcomes and progress on a consistent and frequent basis.**

- Hold meetings of the strategic planning core team on a regular basis to report on progress.
- Include a strategic planning update on all staff and board meeting agendas so progress (or lack thereof) is addressed regularly.
- Contact Aly Sterling Philanthropy if you're having trouble sticking to your plan – we can help!

**6. Celebrate your success.**

- Plan an end-of-year celebration and debrief, inviting staff and stakeholders to update them on the strategic plan's status.
- Work toward your goals to earn the celebration!



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