



STRATEGIC PLAN

101



STEPS 1 & 2

STEP 1 Products and Services

Products & Services:
Deliverables that
the customer
receives

STEP 2 Key Customers

Customers: Any
person, group or
organization
receiving your
product(s)
and/or service(s)

EXAMPLES

STEP 1 *Products and Services*

- Property valuation
- Fire suppression
- Job announcements
- Crime control
- Restaurant inspections
- Building permits

STEP 2 *Key Customers*

- Citizens
- Businesses
- Community Groups
- Homeowners
- Restaurants

STEP 3 - SWOT

SWOT: Develops a clear sense of reality

- Internal Strengths: Resources or capabilities that can be used for accomplishing the mission and vision
- Internal Weaknesses: Deficiencies in resources or capabilities that hinder your ability to be successful
- External Opportunities: Factors or situations that exist beyond your organization that may have a favorably effect
- External Threats: Factors or situations that exist beyond your organization that can have a negative effect

STEP 3 - SWOT



STEP 3 - SWOT

INTERNAL STRENGTHS: Resources or capabilities that can be used for accomplishing the mission and vision

INTERNAL WEAKNESSES: Deficiencies in resources or capabilities that hinder your ability to be successful

STRENGTHS

- Visionary leaders
- Good facilities
- Available learning opportunities

WEAKNESSES

- High turnover rate
- Outdated policies & procedures
- Outdated technology
- Employee morale

STEP 3 - SWOT

External Opportunities: Factors or situations that exist beyond your organization that may have a favorably effect on it

External Threats: Factors or situations that exist beyond your organization that can negatively affect it

OPPORTUNITIES

- Untapped financial resources
- Increase in access to technology
- Destination point
- Public / private partnerships

THREATS

- Increasing crime
- Unfunded mandates
- Increasing customer expectations for services

MEANS FOR EVALUATING STEP 3

SWOT

- Are the strengths & weaknesses internally focused?
- Are the opportunities & threats externally focused?
- Have you identified factors that will realistically impact your ability to succeed or fail?
- Which items will (or should) “put you out of business” if you fail to address them?
- Have you included current issues that will continue into the future?
- Does your SWOT anticipate changes that will impact your products & services and key customers?
- Have you considered all sources of information?

PHASE B - YOUR DESTINATION

Four Steps

STEP 4
Mission

STEP 5
Vision

STEP 6
Values

STEP 7
Goals

COMMUNITY VISION - 2030

1. Economic Sustainability
2. A Center for Lifelong Learning
3. Housing Opportunities for All
4. Arts and Culture
5. A Green City
6. America's Healthiest City
7. A Connected Community
8. Smart, Citizen-Focused Government

STEP 4 - MISSION

Mission Statement:

- Statement of purpose; fundamental reason for an organization's existence

Examples:

- We put out fires, we save lives, we stay safe
- To improve the quality of life by protecting our natural resources

PURPOSE STATEMENT TEMPLATE

The purpose of the _____

Department

Is to produce/provide _____

Products & Services

For _____

Customers

So they can _____

Purpose

MISSION STATEMENT

- **MISSION STATEMENT**

To provide excellence & innovation in the care of patients, the training of health professionals and the creation and sharing of health knowledge.

Community Health System

MEANS FOR EVALUATING STEP 4

Mission

- Does it succinctly describe the fundamental reason for your organization's existence?
- Is it easy to remember; can you repeat it without looking?
- Is it easy to understand?
- Will employees be able to make the connection between what they do & the accomplishment of the mission?
- Does it clearly state the benefit your customers receive from you?

Step 5 - Vision

Vision Statement:

A word picture of the future that the organization intends ultimately to become or to influence

Examples:

To have a computer on every desk and in every home



MEANS FOR EVALUATING STEP 5

Vision

- Is it future focused?
- Is it concise?
- Will your employees see how their jobs relate to achieving the vision?
- Is it inspirational & compelling?
- Is it consistent with your mission?
- Is it a “stretch”?

STEP 6 - CORE VALUES

Core Values:
Principles that govern our behavior & the way we do business

Examples:

- Customer focused
- Personal accountability
- Teamwork
- Safety

Customer Focused: Solicits and listens intently to customer requirements and expectations; delivers what is promised to customers

MEANS FOR EVALUATING STEP 6

Core Values

- Do these values convey how you want people in the organization to act when no one is looking?
- Will the staff understand the meaning of the values?
- Will they hold true for the future?
- Are these values easy to remember?

STEP 7 - GOALS

Goals: Broad statements of measurable outcomes to be achieved on behalf of customers

Example:

- Mission: To develop a community of healthy neighborhoods
- Vision: All residents have access to quality healthcare
- Customers: Families with limited access to healthcare
- Goal #1: Increase community wellness
- Goal #2: Increase access to healthcare services

Step 7 – Goals vs. Objectives

Goals: Broad statements of measurable outcomes to be achieved on behalf of customers

Objectives: Statements of what you must do well or barriers that you must overcome to achieve a specific goal

Example:

- Mission: To develop a community of healthy neighborhoods
- Vision: All residents have access to healthcare
- Customers: Families with limited access to healthcare
- Goal #1: Increase community wellness
- Goal #2: Increase access to healthcare services

MEANS FOR EVALUATING STEP 7

Goals:

- Do they fit within the boundaries of your organization's mission & vision?
- Do they describe the outcomes for your customers (versus actions you will take)?
- Will you be able to measure your progress and know when you reach your goal?
- Can you envision initiatives and tasks that will make your goals a reality?
- Do these goals address issues raised in your SWOT and is there a clear relationship between your goals & your SWOT?

PHASE C - ROAD TO GET THERE

Four Steps

**STEP 8
Objectives**

**STEP 9
Measures**

**STEP 10
Targets**

**STEP 11
Initiatives**

STEP 8 - OBJECTIVES

Objectives:

- Statements of what you must do well or barriers that you must overcome to achieve a specific goal:
If _____, then _____

1.0 Goal: Highest ranked in customer service

- 1.1 Deliver Passengers on time**
- 1.2 Deliver luggage with the passenger**
- 1.3 Provide a comfortable environment**
- 1.4 Provide timely response to customers**

MEANS FOR EVALUATING STEP 8

Objectives:

- Does the objective sound like it is something you can go & do?
 - If yes, it may be initiative or task
 - If yes, ask “**Why** would I do this? *The answer will get you closer to an objective*
- Can you identify multiple initiatives and tasks that would contribute to the accomplishment of each objective?
 - Is the objective specific & measurable?

STEP 9 - PERFORMANCE MEASURES

Performance Measures:
Meaningful indicators that assess progress towards accomplishment of goals & objectives

– DEFINITION:

Outcome Measures Assess the ultimate benefit to the customer

– DEFINITION:

Intermediate Measures Assess what drives the organization to ultimate success

ALIGNMENT

Outcome measures

Intermediate measures

Operational measures

Employee measures



MEANS FOR EVALUATING STEP 9

Performance Measures

- Does each measure provide meaningful information?
- Are the data available & reliable?
- Do you have or can you develop a mechanism for collecting & reporting the data?
- How difficult will it be to collect & report the data?
- Who is the measure important to: Staff, Supervisors, Citizens, Senior Management?

Goals

Objectives

Inter. Measures

1.0 Right people with the right skills in the right job

1.1 Increase retention of an exceptional & diverse workforce

1.1.1 EEO Stats
1.1.2 Turnover rate-high performers
1.1.3 % of positive hires

Outcome

Measures:
Customer Satisfaction

1.2 Improve your competitive edge

1.2.1 Benefits value
1.2.2 Benchmarked salary study
1.2.3 % of 1st choice acceptance

Improved mission critical results

1.3 Reduce skills gap

1.3.1 Training \$\$ as % of gross salaries
1.3.2 Avg trng hrs/FTE
1.3.3 Level 1-4 evals

STEP 10 - TARGETS

Targets: The numerical value of the performance measure you hope to achieve

Measure:
Customer
satisfaction
rating
Target:
95% score

– Measure: %
of baggage
lost
• Target:
7% by
(date)

Note: You cannot establish a target until you have established a baseline for the measure

STEP 10 - TARGETS

GOAL OR OBJECTIVE	MEASURE	TARGET
Ensure neighborhood safety	Violent crime rate for Class I crimes	10% reduction
Increase customer satisfaction	Customer satisfaction rating	4.2 rating on a 5 point scale
Become a learning organization	Annual expenditure as a % of budget	4% of budget

REPORTING

Outcome measures

Intermediate measures

Operational measures

Employee measures

Senior Mgmt

A few key outcome measures

Middle Mgmt

Outcome plus
Intermediate measures
of interest

Supervisors/Managers

Operational plus
Intermediate measures
of Interest

MEANS FOR EVALUATING STEP 10

Targets:

- Will each target make sense to your organization & your customers?
- Is it meaningful & realistic?
- Does it measure positive progress?
- Will you know when you have reached your target?
- Are you able to set a baseline & a timeframe?

STEP 11 – INITIATIVES AND TASKS

INITIATIVES AND TASKS: Specific programs, strategies and activities that will help you meet your performance targets

- Where everyone WANTS to go

MEANS FOR EVALUATING STEP 11

Initiatives:

- If these initiatives & tasks are introduced, will they yield progress toward the targets?
- Do they address the barriers that must be overcome in order to make progress?
- Can the organization realistically implement them (costs, consequences, benefits, skills, resources)?
- Is the number manageable?
- How many cross functional areas will require extra effort to implement?

STEP 12 – CHECK IN

Is your plan aligned with the larger community in which you do business?

Does your plan address the results of your SWOT analysis?

Is this a plan that employees can rally around, support and contribute to its accomplishment?

Do you love it!!!?

IMPLEMENTATION

- Accidents happen...but your plan won't be “accidentally” implemented

