

STRATEGIC PLANNING DRAFT DOCUMENT

Strategic planning is the process by which the guiding members of the organization develop a vision of the future and define a road map for attaining that future. Strategic planning focuses on a horizon of five or more years; however, it is a valuable exercise for short-term strategy development as well.

While strategic planning is usually conducted for the organization as a whole, functional units of the organization and particular lines of business may also conduct business i.e., program strategic planning. The process of deploying and implementing the strategic plan has been termed as strategic management and/or operational/tactical planning and management.

Definitions

<i>Business</i>	Organization, agency, non-profit, etc.
<i>Client</i>	Customer, audience, end-user, etc.
<i>Competition</i>	Competing agencies, programs, market-based incentives, etc.
<i>Market</i>	Natural resources, consumers, competition, etc.
<i>Product</i>	Program, materials, projects, etc.
<i>Profit/Loss</i>	Risk/benefit
<i>Service</i>	communications, networking, support, etc.

The following is a description of the key elements of the strategic planning process and pertinent outcomes from those efforts.

1. Strategic Planning Workshop

This is recommended when it is crucial to identify important trends and directions that the organization should consider before attempting developing a strategic plan. May proceed organization-wide strategic planning.

2. Strategic Planning Model

Typical strategic planning model consists of these elements:

- Organizational assessment
- Preparation of executive and data summaries
- Marketing plan development
- Communications strategy
- Product and services positioning and development
- Competitive analysis
- New media integration

3. Marketing Plan Development and Execution

Tailored to the unique needs of the organization. This includes the broader strategic vision of business all the way down to the detailed tactical elements of a plan. The contents of a marketing plan include:

- **Executive Summary** - This presents an abbreviated overview of the proposed plan for a top-level understanding.
- **Current Marketing Situation** - This presents relevant background data on market, products/services, competition, distribution and macroenvironment.
- **Opportunity and Issue Analysis** - This summarizes the main opportunities/threats, strengths/weaknesses and issues facing the product that the plan must address.
- **Objectives** - This defines the goals the plan wants to achieve in the areas of sales volume, market share and profit.
- **Marketing Strategies** - This presents the broad marketing approach that will be used to meet the plan's objectives.
- **Action Programs** - This answers What will be done? Who will do it? When will it be done? and How much will it cost?
- **Projected Profit/Loss Statement** - This summarizes the expected financial payoff from the plan.
- **Controls** - This section covers how the plan will be monitored.

4. Communication Strategy and Execution

Effective communication is essential to the success of the organization. An effective communication strategy consists of the "right message delivered through the right medium." The main elements of an effective communication strategy include:

- Communication strategy
- Media selection
- Communication content development

Communication Strategy

An effective communication strategy helps you to identify your communication goals and to develop the strategy that will work best for the message that you would like to deliver. The steps in developing an effective communication strategy are:

- Understanding your business and communication needs
- Consider the competition and focus on the strengths of the District and how these strengths match the needs of your target audience
- Organize all of the variables into a clear message and powerful communication strategy
- Use a world-class design and cutting-edge technology to produce deliverables that will exceed goals.

Media Selection

An integral part of your message is your media. Using the right media will ensure your message is delivered effectively and efficiently. Know the benefits, functions and bottomline advantages of each

medium. Get the direction you need so that your message reaches your audience in the format that creates the highest impact.

Communication Content Development

Communication content development requires time and energy to think things through so that your message is clear and precise. It is a process that allows no shortcuts in research, conceptualizing, outlining, editing and rewriting. Translate your company strengths and key messages into copy that is concise, engaging and clear - all tailored to the media you choose.

5. Product/Service Positioning

Understanding consumer perceptions of your product/service, in relation to your competition, is critical for effectively marketing your product/service in any given segment. With positioning, you can identify consumers' perceptions of your product/service, identify market opportunities, understand relative strengths and weaknesses of offerings (and your competitors) and determine the best way to position or reposition your product/service to strengthen your brand in each market.

Analyze your products/services to create the most effective positioning statement and market attack plan. Develop perceptual and preference maps of your product/service category, displaying your brand vs. competition, superimposed on critical attributes that define your product/service category. Typically, these maps are developed for each relevant market segment.

Typical Positioning Project Objectives

- Assessing the competitive position vis-à-vis competitors
- Creating a segmented view of the marketplace, emphasizing the critical needs of each subset
- Formulating a sound positioning strategy that forms an umbrella for all the company's current and contemplated product lines
- Defining a set of actionable marketing programs that will secure an effective and sustainable market position

New Product/Service Development

The creation of a new product development process establishes a process for proper prioritization of new product direction and allows all appropriate managers to make recommendations regarding new product ideas. This process is owned, run and controlled by the group that is developing the new product. This process encourages active involvement from all levels of the organization to ensure that the most important decisions are resolved professionally and is tracked and articulated to all participants.

6. Competitive Intelligence and Analysis

Because today's business playing field is so competitive, it is not enough just to know your competitor's product line up, pricing and basic information. In order to win the battle and leave your competitors in the dust, a company must gather and analyze as much information as possible, such as:

- Strengths (what is the main positioning of the competitor in the marketplace) and weaknesses (where can the competitor be attacked)
- Marketing, manufacturing and distribution strategies

- Human resource strategies and organizational infrastructure (what type of culture exists and what are the key hiring strategies)
- Business development and acquisition strategy (does the competitor grow sales and earnings via new product development and innovation or acquisitions)

The most important element of competitive intelligence and analysis is to design a process and system that is relevant and actionable for your company. Components of the process may include:

- Your views, objectives and overall goals
- Ensure that the information that is collected can be converted into actionable intelligence
- Design a communication and gathering process which involves everyone in the organization
- Analysis and action plan must be thorough and accurate

7. New Media Integration

The key to attracting and keeping new and existing customers is the ability to link all marketing plans to your web strategy and properly communicate the appropriate information to all parties.

Also, providing customer access to as much information as possible allows faster and more productive use of everyone's time, inside and outside of the company. Customers and consumers appreciate the ability to use the web to search for your company information, order products, compare alternatives, etc. Therefore, ensuring there is a close link between the Marketing Plans (including execution) and web helps to strengthen the link between your company and your customers.

Web Strategy and Design

Delivering a powerful online marketing strategy involves site conception and design. Also important are effective web site promotion, updating and ongoing support. Apply the following phases in designing a comprehensive web site.

- Phase 1 - Content and information
- Phase 2 - Charting and navigation
- Phase 3 - Design
- Phase 4 - Implementation

STRATEGIC PLAN DRAFT DOCUMENT

INTRODUCTION

Simply put, strategic planning determines where an organization is going over the next year or more, how it's going to get there and how it'll know if it got there or not. Far more important than the strategic plan document, is the planning process itself. There are a variety of perspectives about strategic planning and a variety of approaches used in the strategic planning processes. This topic in the library provides overview of many of those perspectives and approaches and also includes guidelines for the reader to carry out planning according to the nature and needs of their organization.

Quite often, an organization's strategic planners already know much of what will go into a strategic plan (this is true for business planning, too). However, development of the strategic plan greatly helps to clarify the organization's plans and ensure that key leaders are all "on the same script". Far more important than the plan document, is the planning process itself.

DEFINITIONS

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RECOMMENDED APPROACH TO STRATEGIC PLANNING

Major differences in how organizations carry out the various steps and associated activities in the strategic planning process are more a matter of the size of the organization -- than its for-profit/nonprofit status. Small nonprofits and small for-profits tend to conduct somewhat similar planning activities that are different from those conducted in large organizations. On the other hand, large nonprofits and large for-profits tend to conduct somewhat similar planning activities that are different from those conducted in small organizations. (The focus of the planning activities is often different between for-profits and nonprofits. Nonprofits tend to focus more on matters of board development, fundraising and volunteer management. For-profits tend to focus more on activities to maximize profit.)

Also, in addition to the size of the organization, differences in how organizations carry out the planning activities are more a matter of the nature of the participants in the organization -- than its for-profit/nonprofit status. For example, detail-oriented people may prefer a linear, top-down, general-to-specific approach to planning. On the other hand, rather artistic and highly reflective people may favor of a highly divergent and "organic" approach to planning.

BENEFITS OF STRATEGIC PLANNING

Strategic planning serves a variety of purposes in organization, including to:

1. Clearly define the purpose of the organization and to establish realistic goals and objectives consistent with that mission in a defined time frame within the organization's capacity for implementation.
2. Communicate those goals and objectives to the organization's constituents.
3. Develop a sense of ownership of the plan.
4. Ensure the most effective use is made of the organization's resources by focusing the resources on the key priorities.
5. Provide a base from which progress can be measured and establish a mechanism for informed change when needed.
6. Bring together of everyone's best and most reasoned efforts have important value in building a consensus about where an organization is going.

Other reasons include that strategic planning:

- Provides clearer focus of organization, producing more efficiency and effectiveness
- Bridges staff and board of directors (in the case of corporations)
- Builds strong teams in the board and the staff (in the case of corporations)
- Provides the glue that keeps the board together (in the case of corporations)
- Produces great satisfaction among planners around a common vision
- Increases productivity from increased efficiency and effectiveness
- Solves major problems

WHEN SHOULD STRATEGIC PLANNING BE DONE?

The scheduling for the strategic planning process depends on the nature and needs of the organization and the its immediate external environment. For example, planning should be carried out frequently in an organization whose products and services are in an industry that is changing rapidly . In this situation, planning might be carried out once or even twice a year and done in a very comprehensive and detailed fashion (that is, with attention to mission, vision, values, environmental scan, issues, goals, strategies, objectives, responsibilities, time lines, budgets, etc). On the other hand, if the organization has been around for many years and is in a fairly stable marketplace, then planning might be carried out once a year and only certain parts of the planning process, for example, action planning (objectives, responsibilities, time lines, budgets, etc) are updated each year.

Consider the following guidelines:

1. Strategic planning should be done when an organization is just getting started. (The strategic plan is usually part of an overall business plan, along with a marketing plan, financial plan and operational/management plan.)
2. Strategic planning should also be done in preparation for a new major venture, for example, developing a new department, division, major new product or line of products, etc.

3. Strategic planning should also be conducted at least once a year in order to be ready for the coming fiscal year (the financial management of an organization is usually based on a year-to-year, or fiscal year, basis). In this case, strategic planning should be conducted in time to identify the organizational goals to be achieved at least over the coming fiscal year, resources needed to achieve those goals, and funds needed to obtain the resources. These funds are included in budget planning for the coming fiscal year. However, not all phases of strategic planning need be fully completed each year. The full strategic planning process should be conducted at least once every three years. As noted above, these activities should be conducted every year if the organization is experiencing tremendous change. Each year, action plans should be updated.

Note that, during implementation of the plan, the progress of the implementation should be reviewed at least on a quarterly basis by the board. Again, the frequency of review depends on the extent of the rate of change in and around the organization.

PREPARATION FOR STRATEGIC PLANNING

- Planning Guidelines
- Planning Facilitator?
- Who Should Be Involved?
- How Many Meetings?
- How Do We Ensure Implementation?

Planning Guidelines

Many managers spend most of their time "fighting fires" in the workplace. -- their time is spent realizing and reacting to problems. For these managers -- and probably for many of us -- it can be very difficult to stand back and take a hard look at what we want to accomplish and how we want to accomplish it. We're too busy doing what we think is making progress. However, one of the major differences between new and experienced managers is the skill to see the broad perspective, to take the long view on what we want to do and how we're going to do it. One of the best ways to develop this skill is through ongoing experience in strategic planning. The following guidelines may help you to get the most out of your strategic planning experience.

1. The real benefit of the strategic planning process is the process, not the plan document.
2. There is no "perfect" plan. There's doing your best at strategic thinking and implementation, and learning from what you're doing to enhance what you're doing the next time around.
3. The strategic planning process is usually not an "aha!" experience. It's like the management process itself -- it's a series of small moves that together keep the organization doing things right as it heads in the right direction.
4. In planning, things usually aren't as bad as you fear nor as good as you'd like.
5. Start simple, but start!

Planning Facilitator?

You may want to consider using a facilitator from outside of your organization if:

1. Your organization has not conducted strategic planning before.
2. For a variety of reasons, previous strategic planning was not deemed to be successful.
3. There appears to be a wide range of ideas and/or concerns among organization members about strategic planning

- and current organizational issues to be addressed in the plan.
4. There is no one in the organization whom members feel has sufficient facilitation skills.
 5. No one in the organization feels committed to facilitating strategic planning for the organization.
 6. Leaders believe that an inside facilitator will either inhibit participation from others or will not have the opportunity to fully participate in planning themselves.
 7. Leaders want an objective voice, i.e., someone who is not likely to have strong predispositions about the organization's strategic issues and ideas.

Who Should Be Involved?

Strategic planning should be conducted by a planning team. Consider the following guidelines when developing the team. (Note that reference to boards of directors is in regard to organizations that are corporations.)

1. The chief executive and board chair should be included in the planning group, and should drive development and implementation of the plan.
2. Establish clear guidelines for membership, for example, those directly involved in planning, those who will provide key information to the process, those who will review the plan document, those who will authorize the document, etc.
3. A primary responsibility of a board of directors is strategic planning to effectively lead the organization. Therefore, insist that the board be strongly involved in planning, often including assigning a planning committee (often, the same as the executive committee).
4. Ask if the board membership is representative of the organization's clientele and community, and if they are not, the organization may want to involve more representation in planning. If the board chair or chief executive balks at including more of the board members in planning, then the chief executive and/or board chair needs to seriously consider how serious the organization is about strategic planning!
5. Always include in the group, at least one person who ultimately has authority to make strategic decisions, for example, to select which goals will be achieved and how.
6. Ensure that as many stakeholders as possible are involved in the planning process.
7. Involve at least those who are responsible for composing and implementing the plan.
8. Involve someone to administrate the process, including arranging meetings, helping to record key information, helping with flipcharts, monitoring status of prework, etc.
9. Consider having the above administrator record the major steps in the planning process to help the organization
10. conduct its own planning when the plan is next updated.

Note the following additional considerations:

- Different types of members may be needed more at different times in the planning process, for example, strong board involvement in determining the organization's strategic direction (mission, vision, and values), and then more staff involvement in determining the organization's strategic analysis to determine its current issues and goals, and then primarily the staff to determine the strategies needed to address the issues and meet the goals.
- In general, where there's any doubt about whether a certain someone should be involved in planning, it's best to involve them. It's worse to exclude someone useful than it is to have one or two extra people in planning -- this is true in particular with organizations where board members often do not have extensive expertise about the organization and its products or services.
- Therefore, an organization may be better off to involve board and staff planners as much as possible in all phases of planning. Mixing the board and staff during planning helps board members understand

the day-to-day issues of the organization, and helps the staff to understand the top-level issues of the organization.

How Many Meetings?

Number and Duration of Planning Meetings

New planners usually want to know how many meetings will be needed and what is needed for each meeting, i.e., they want a procedure for strategic planning. The number of meetings depends on whether the organization has done planning before, how many strategic issues and goals the organization faces, whether the culture of the organization prefers short or long meetings, and how much time the organization is willing to commit to strategic planning. Attempt to complete strategic planning in at most two to three months, or momentum will be lost and the planning effort may fall apart.

Scheduling of Meetings

Have each meeting at most two to three weeks apart when planning. It's too easy to lose momentum otherwise. The most important factor in accomplishing complete attendance to planning meetings is evidence of strong support from executives. Therefore, ensure that executives a) issue clear direction that they strongly support and value the strategic planning process, and b) are visibly involved in the planning process.

An Example Planning Process and Design of Meetings

One example of a brief planning process is the following which includes four planning meetings and develops a top-level strategic plan which is later translated into a yearly operating plan by the staff:

1. Planning starts with a half-day or all-day board retreat and includes introductions by the board chair and/or chief executive, their explanations of the organization's benefits from strategic planning and the organization's commitment to the planning process, the facilitator's overview of the planning process, and the board chairs and/or chief executive's explanation of who will be involved in the planning process. In the retreat, the organization may then begin the next step in planning, whether this be visiting their mission, vision, values, etc. or identifying current issues and goals to which strategies will need to be developed. (Goals are often reworded issues.) Planners are asked to think about strategies before the next meeting.
2. The next meeting focuses on finalizing strategies to deal with each issue. Before the next meeting, a subcommittee is charged to draft the planning document, which includes updated mission, vision, and values, and also finalized strategic issues, goals, strategies. This document is distributed before the next meeting.
3. In the next meeting, planners exchange feedback about the content and format of the planning document. Feedback is incorporated in the document and it is distributed before the next meeting.
4. The next meeting does not require entire attention to the plan, e.g., the document is authorized by the board during a regular board meeting.
5. Note that in the above example, various subcommittees might be charged to gather additional information and distribute it before the next planning meeting.

Note, too, that the staff may take this document and establish a yearly operating plan which details what strategies will be implemented over the next year, who will do them, and by when. No matter how serious organizations are about strategic planning, they usually have strong concerns about being able to find time to attend frequent meetings. This concern can be addressed by ensuring meetings are well managed,

having short meetings as needed rather than having fewer but longer meetings, and having realistic expectations from the planning project.

How Do We Ensure Implementation?

A frequent complaint about the strategic planning process is that it produces a document that ends up collecting dust on a shelf -- the organization ignores the precious information depicted in the document.

The following guidelines will help ensure that the plan is implemented. (Note that reference to boards of directors is in regard to organizations that are corporations.)

1. When conducting the planning process, involve the people who will be responsible for implementing the plan. Use a cross-functional team (representatives from each of the major organization's products or service) to ensure the plan is realistic and collaborative.
2. Ensure the plan is realistic. Continue asking planning participants "Is this realistic? Can you really do this?"
3. Organize the overall strategic plan into smaller action plans, often including an action plan (or work plan) for each committee on the board.
4. In the overall planning document, specify who is doing what and by when (action plans are often referenced in the implementation section of the overall strategic plan). Some organizations may elect to include the action plans in a separate document from the strategic plan, which would include only the mission, vision, values, key issues and goals, and strategies. This approach carries some risk that the board will lose focus on the action plans.
5. In an implementation section in the plan, specify and clarify the plan's implementation roles and responsibilities. Be sure to detail particularly the first 90 days of the implementation of the plan. Build in regular reviews of status of the implementation of the plan.
6. Translate the strategic plan's actions into job descriptions and personnel performance reviews.
7. Communicate the role of follow-ups to the plan. If people know the action plans will be regularly reviewed, implementers tend to do their jobs before they're checked on.
8. Be sure to document and distribute the plan, including inviting review input from all.
9. Be sure that one internal person has ultimate responsibility that the plan is enacted in a timely fashion.
10. The chief executive's support of the plan is a major driver to the plan's implementation. Integrate the plan's goals and objectives into the chief executive's performance reviews.
11. Place huge emphasis on feedback to the board's executive committee from the planning participants.

Consider all or some of the following to ensure the plan is implemented.

- Have designated rotating "checkers" to verify, e.g., every quarter, if each implementer completed their assigned tasks.
- Have pairs of people be responsible for tasks. Have each partner commit to helping the other to finish the other's tasks on time.

ORGANIZATIONAL ASSESSMENTS

Strategic Analysis

- Environmental Scan
- Organization's Strengths & Weaknesses, Opportunities & Threats (SWOT)
- Organizational Assessment

Setting Strategic Direction

- Strategizing (strategic goals/methods for achievement)
- Developing/Updating Mission Statement
- Developing/Updating Vision Statement
- Developing/Updating Values Statement

Action Strategies

- Annual plan
- Objectives
- Roles & Responsibilities
- Timelines

Writing & Communicating the Plan

Monitoring, Evaluating & Deviating from the Plan

Strategic Analysis (Environmental Scan and SWOT)

A frequent complaint about strategic plans is that they are merely "to-do" lists of what to accomplish over the next few years. Or, others complain that strategic planning never seems to come in handy when the organization is faced with having to make a difficult, major decision. Or, other complain that strategic planning really doesn't help the organization face the future. These complaints arise because organizations fail to conduct a thorough strategic analysis as part of their strategic planning process. Instead, planners decide to plan only from what they know now. This makes the planning process much less strategic and a lot more guesswork. Strategic analysis is the heart of the strategic planning process and should not be ignored.

(Note that some planners prefer to identify/update the mission, vision and values statements before conducting the strategic analysis. Others prefer to identify/update these items after the strategic analysis. In this library, these items are addressed as part of the next major section "Setting Strategic Direction".)

Environmental Scan

Once you have your vision and mission statements in place, you have a picture of where you want to go. The next step is to understand where you are now. This is the process of taking stock and involves thorough examining of both the internal status of your district or school and the external context in which it is situated.

Conduct an Environmental Scan. An environmental scan is conducted to collect data to answer questions about the present and future of the school district.

- Your environmental scan develops a common perception.
- Your environmental scan identifies strengths, weaknesses, trends and conditions.
- Your environmental scan draws on internal and external information.
- Your environmental scan is a key on-going process for internal and external honesty and openness to changing conditions.

Tools for Environmental Scanning. There are many approaches to environmental scanning, including:

- Surveys
- Questionnaires
- Focus Groups
- Open Forums

SWOT Analysis

When dealing with complex situations in a limited amount of time, trying to address all the issues involved often does not pay off. Rather, strategic planners limit their efforts to those issues that have the most impact on the situation. SWOT analysis provides a framework for identifying these critical issues. First, the focus is on the concerned entity: a region, a city, a neighborhood, a building, a person. Then, analyses are limited to the significant strengths, weaknesses, opportunities, and strengths that characterize the situation.

For illustrative purposes let us apply the SWOT framework to Ms. June E. Ear's situation. Strengths are positive aspects internal to the entity: June's ability to work hard is a strength. Weaknesses are negative aspects internal to the entity: June's tendency to procrastinate is a weakness. Opportunities are positive aspects external to the entity: June's supervisor rewards those who satisfactorily complete projects. Threats are negative aspects external to the entity: there is often not enough time to complete most projects.

In reporting each of your analyses in the analysis phase of the class project, please use the following general format. The bulk of your report (at least a page and a half) will be a narrative summary of the issues that characterize the site. This narrative will be a well-organized, reasonably expansive discussion of how the current topic (urban systems and processes, imageability, etc.) applies to the site. The narrative will be followed by a list of significant strengths, weaknesses, opportunities, and threats. Each item in this bulleted SWOT list must be a short but evocative descriptor of an issue, and the list itself must be organized into the four categories of issues. There may be more than one item in each category, or there may be no items at all. For example, a site may have no significant strengths whatsoever in terms of spatial definition.

The purpose of SWOT analysis is to isolate key issues and to facilitate a strategic approach. Be sure that is exactly what you do. To this end, the items in the SWOT list must have been discussed earlier in the narrative. If they bear no relation to the earlier discussion, then they must be elaborated, and that defeats the purpose of the SWOT list.

Finally, while the SWOT list appears at the end of your narrative, please be absolutely sure that it is not an afterthought, hastily thrown together to satisfy this requirement. If you do not approach this list seriously, you will find later in the project that you are at a serious disadvantage. Here is why. During the

design phase of the project, you will be required to identify the top three design issues that you will address in your design scheme. These three issues will be selected from the various SWOT lists you compiled during the analysis phase. The more carefully constructed your SWOT lists, the more easy you will find focusing on the three most important issues.

SWOT: Strategic Planning Process Worksheet

- Strengths Coalition characteristics that allow the coalition to take advantage of opportunities or reduce the impact of barriers.
- Weaknesses Coalition characteristics that could stand in the way of the coalition taking advantage of opportunities or reducing the impact of barriers.
- Opportunities Factors outside the coalition that allow it to take action to encourage cessation, prevent tobacco use or protect the general public from exposure to environmental tobacco smoke.
- Threats Factors outside the coalition that stand in the way of its efforts to encourage cessation, prevent tobacco use or protect the general public from exposure to environmental tobacco smoke.

Sources: Adapted from Pearce, J.A. and Robinson, R.B., Strategic Management: Strategy Formulation and Implementation, 1988.

Basics of Identifying Strategic Issues and Goals

This activity is usually conducted as part of the overall strategic planning. Therefore, the reader might best be served to first read the information in the topic Strategic Planning.

Strategic issues and goals are usually identified near the end of the strategic analysis activity (which usually includes doing an environmental scan and SWOT analysis.)

1. Identify issues by addressing questions such as:
 - a) “What external changes could effect the organization?” Consider, e.g., changing demographics of stakeholders, including number, values, resources, power, etc.; changing rules and regulations; expectations and resources from customers, vendors, etc.; expected shifts in needs for products and services; availability of leadership and staffing; and what other current or new organizations provide similar services?
 - b) “What could be the effects of these changes in terms of threats or opportunities?”
 - c) “What changes must we make to address the threats?”
 - d) “What strengths can we build on to take advantage of the opportunities?”(If planners seem reluctant to address these questions, allocate half an hour for a highly focused discussion around their reasons for not addressing these questions.)
2. Use a round-robin technique to collect and organize members’ input.
3. Visit with each issue, whether it’s “important” or “urgent.” Often, issues seem very important when they’re only urgent, for example, changing a flat tire is an urgent issue -- but you'd never put "changing a tire" in your strategic plan. Attend only to the important issues and not the urgent issues. Attend to the important issues and not the urgent issues.
4. Facilitate to gain consensus on the top three to five issues and goals, and then prioritize them.

Issues and goals usually come from strengths to be build on, weaknesses to be strengthened opportunities to be taken, and threats to be avoided. Many issues are based on gut feeling or intuition, rather than on extensive external and internal assessments. Issues that are too narrow do not warrant planning and issues that are too broad will bog you down.

Deal with issues that you can do something about. Help planners realize they can overcome pending issues. Too often, because of shortage of resources, planners tend to be highly reactive, rather than proactive.

Issues should be clearly articulated so that another outside of the organization can understand the description of the issue. It helps to temper ideas, i.e., verify them against reality by having someone in the group assigned to be the “devil’s advocate.” Their role is to ask straightforward questions in an effort to get group members to adequately examine the current suggestion or idea before accepting it.

Be careful not to ignore current major issues in the interest of pursuing more creative and forward-looking goals. Many organizations have faltered because their planning focused too far down the road and they ended up falling over their feet.

Have someone reword issues to goals. Note that goals should be worded such that, when they are reached, they will have addressed an issue. Planning members should review wording of the goals to ensure all members understand the goals and that the goals, when reached, will address each issue.