

Helen J. Wythe & Associates

Consulting, Facilitating and Training Services

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Our Services > Convening Facilitation Events > Strategic Planning

If you would like your organization to be more effective in the future, you should invest in strategic planning. Strategic planning guides staff on how to handle the challenges of providing services and programs and helps you decide where the Organization should be focusing and how.

The aim of strategic planning is to develop a forward-looking plan for the Organization for the next 3-5 years. This plan will establish 3-6 major Strategic Directions and plans for achieving them.



To effectively create and select goals, *HELEN J. WYTHE & Associates* uses a six phase process that helps an Organization create but most importantly implement its Strategic Plan.

Phase One Getting Ready to Plan

To get ready for any planning process an organization must first assess if it's ready. Successfully negotiating the implementation phase of a Strategic Plan can be traced back to this phase planning to plan. Prior to the Strategic Planning Retreat there are many items that must be wrestled with and planned for. These are challenges such as:

- How do we ensure that all stakeholder views are represented in the planning process?
- How to build confidence and have everyone appropriately involved in successfully implementing the strategies decided upon?

Activities such as: creating a Planning Committee, completing a Historical Scan, developing an Organizational Profile, clarify roles and identify the information required to make a sound decision. The product at the end of Phase One: is an agreement on the organizations readiness to plan and a Planning Work Plan – a Plan for Planning.

Phase Two Articulating Mission and Values

Mission, value and vision are three framework statements that every organization requires to guide, set direction and provide focus. Products of this phase are a confirmation of an existing mission and value statements or new / adapted mission and value statements.

Phase Three Planning Retreat – Data Generation

In today's fast changing fluid society visions will usually hold for 3-5 years, Strategic Directions 18 months to 2 years and detailed Action / Operational planning are

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completed for a six month time frame. Adequately resourced strategic planning exercises require two to three full retreat days every 2-3 years in order to set Strategies and Strategic Directions that will hold for 2-3 years.

Products of this phase are a clearly articulated, practical vision with identified obstacles and challenges to reaching the preferred vision. This plan will also have determined Strategies and Strategic Directions to deal with the obstacles and a detailed six-month action / operational plan with built in reviews.

Phase Four Report Generation

The product of this phase is a Strategic Planning document suitable for internal and or external use. It consists of an Executive Summary providing background and contextual information for the reader that provides synthesis or analysis of the data.

Phase Five Implementation

This is where 95% of Strategic Plans fail. There are four distinct phases that successful planning exercises need to negotiate. 1. Getting Things Started, 2. Sustaining Momentum, 3. Remaneuvering and Making Adjustments, 4. Bringing Closure. Those organizations which are successful in carrying out their plans and reaching their determined accomplishments have been able to negotiate the potential difficulties inherent in each of these phases.

The complex elements of implementing a plan such as timing issues, tasks and process require special attention. Regular contact with the facilitator/consultant bodes well for success. This involves a minimum of once a month contact with the Planning Steering Committee, which can be a face-to-face or by telephone.

Phase Six Monitoring And Evaluation

Monitoring and evaluation of the Strategic Planning process and success of the Plan requires half-day to one full day once every two years. This phase allows learning's from the process to be incorporated into the organizations culture.

The product at the end of Phase Six the incorporation of learning's and insights from the planning process into the organizations culture and everyday operations.

To find out how professional facilitation services makes the most of this investment by focusing on the process opening up time and space for your highly skilled staff to concentrate on the Strategic Plan, please e-mail us at info@hjwythe.com.

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