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**Leadership Development
Initiative (LDI) Curriculum**

Introduction to Strategic Planning Exercise

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Overview

Strategic planning is a process that integrates a mission, values and direction into a vision of a successful future. One of the 5 Practices of Exemplary Leaders is to “Inspire a Shared Vision”. Leaders are expected to have the skills to lead organizations and projects, large and small, forward toward success.

As the strategic planning process is complex, it is helpful to have a tool to guide the small steps, to define the resources that are needed, to determine opportunities, strengths, weaknesses and threats, to determine the outcomes relative to the goal, and identify roles and responsibilities. With a tool, others can work together to take ownership of the optimal plan. In this process, all ‘share the vision’ and ‘model the way’.

Beyond the core team, stakeholders who will be affected by a strategic plan will need to be involved. Having the right people in the right positions on the core planning team is essential, and may involve a mix of backgrounds and specialties.

A practical strategic planning exercise is planned. The objectives of this exercise are to provide a guided approach to strategic planning, to practice facilitation skills, and to present a summary of the strategic plan to the group. There are worksheets to guide the process.

Objectives

After this presentation, participants will:

1. Detail the elements of an effective Strategic Planning Process.
2. Use the Strategic Planning Overview Document.
3. Present and evaluate components of the Strategic Plan.

Important Teaching Points

- Define the overall purpose of your initiative.
- A Situation Analysis, an Environmental Analysis, and SWOT analysis are essential.
- Identify the stakeholders, customers and competitors and determine their needs.
- Create a Vision, Mission and Value statement.
- Define SMART goals and objectives (Specific, Measurable, Agreed Upon, Realistic, Timelines).
- Focus on your Circle of Influence.
- Check progress, celebrate milestones, adjust for changes, problem solve and keep activities on track.

Resources / References

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