# **Strategic and operational planning**

## **Stage 1: Introduction**

Why plan?

Strategic plans

Operational plans

Readiness assessment

## **Stage 2: Preparation**

Pre-planning meeting

Participant questionnaire

## **Stage 3: Strategic planning session**

Agenda, registration, expectations, roles and ground rules

Political, economic, social and technological (PEST) analysis

Organization history

Stakeholder analysis

Do well/do better

Core purpose

Mission statement

Values statement

The future

Vision statement

Goals

Strengths, weaknesses, opportunities and threats

(SWOT) analysis

Objectives

Preliminary strategies

Evaluation

## **Stage 4: Operational planning session**

Agenda

Recap and planning grid

Confirm strategies

Actions

Priorities

Timeframes

Resources

Responsibility

Performance indicators

Risk management

Communications

Reviewing

Evaluation

## **Stage 5: Putting the plans together**

How to sheets

Mission statement

Values statement

Vision statement

Goals and objectives

Planning grid

Checklist