Schulich School of Business Executive Education Centre | YORK UNIVERSITÉ UNIVERSITY

# Overview of Strategic Planning Process

**STEP 1**
**Assess Current Situation**
(Environmental Scan, Gap Analysis)

Assemble a balanced strategic planning team, review documents, assess stakeholders, and understand the competition.

**STEP 2**
**Establish Future Direction**
(Mission, Vision, Values)

Define the purpose of the organization, the image of the future, and the guiding principles.

**STEP 3**
**Define Strategic Directions**
(Goals and Objectives)

Define long-term strategic priorities and goals, the actions to achieve them, and establish metrics that will determine if goals have been achieved.

**STEP 4**
**Develop Strategic Action Plans**
(Initiatives, Tactics, Metrics, Resourcing)

**STEP 5**
**Implement Action Plans and Improve Operations**

Determine implications of the plan to the organizational structure. Know how the plan will be communicated and ensure employee engagement and performance measures are in alignment.

**STEP 6**
**Monitor and Assess Results, Refresh Strategy**
(Capture learning, iterate strategy, reassess resources)

Analyze outcomes, and adjust plans as needed. Create regular reports that are clearly communicated, supported and enforced.

Taken from SEEC's program: The Strategic Public Manager