

TURNING DISRUPTION INTO OPPORTUNITY:
**THE 2021 STRATEGIC
PLANNING TOOLKIT**



WINKLER GROUP

Fueling Your Vision

WWW.WINKLERGROUP.COM

Turning Disruption into Opportunity

THE 2021 STRATEGIC PLANNING TOOLKIT

A little disruption goes a long way in terms of opportunity.

When it's the status quo, things hum along and it's business as usual. But when a crisis pops up—or even a new challenge—we see things differently. We discover what never worked well, or what opportunities we had been missing all along.

Don't waste this opportunity to implement a new plan that capitalizes on what you've learned over the last 18 months. If you are implementing a strategic plan, pull out the plan and re-examine it with a critical eye. And if you don't have a plan, don't waste a minute starting to creating one.

A new strategic plan is the best way to capture what you've learned. It will turn your innovations and your new approaches into long-term strategies for a bigger impact.

At the Winkler Group, our strategic plans focus on helping you:

If you have a strategic plan that works and is helping your organization overcome challenges, congratulations!

If not, we should talk. [Schedule a quick 15-minute call](#) with a Winkler Group expert to turn your pivot into a positive for the long term.

- Rethink your challenges.
- Align your strengths with your potential.
- Keep staff and board members aligned and moving towards common goals.
- Stay accountable by measuring progress.
- Encourage financial investment from key stakeholders.
- Keep board members focused on the big picture—not the day-to-day details.
- Avoid mission creep.

Full-service Strategic Planning and Capital Campaign Firm

Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina

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HOW TO USE THIS TOOLKIT

If your organization is not working at optimum efficiency, you're not alone. We've seen many organizations struggle because they do not have a plan at all, or because their existing plan is no longer relevant. That's because:

- The pandemic highlighted new opportunities for growth and funding.
- Missions expanded to respond to new needs.
- Stakeholders want to be more engaged.
- New donors are ready to make a bigger impact but aren't being given the chance.

We tailor our strategic plans to address these challenges. Most importantly, a Winkler Group strategic plan is designed to engage your donors and key stakeholders because you can't achieve your vision without funding.

Our hope is that this tool kit will be a helpful resource as you take the first step towards efficiency and impact. The goal is for your organization to be like a boat with all oars rowing in the same direction—and a motor with enough fuel to get you where you want to go.



IF YOU ARE IMPLEMENTING AN EXISTING STRATEGIC PLAN:

- Review it objectively using appreciative inquiry.
- Determine post-pandemic relevance of current goals and strategies.
- Measure progress to date.
- Identify new opportunities and how they can transform what you do today.
- Continue with the steps in the following box.



BEGIN OR RESTART THE STRATEGIC PLANNING PROCESS BY FOLLOWING THESE STEPS:

- Review the planning process overview.
- Begin filling in the roadmap on page 4.
- Identify key stakeholders and donors to involve in the planning process.
- Identify a staff person to spearhead the planning process.
- Begin to identify the potential priorities that will drive your work over the next 3-5 years.
- Engage a strategic planning firm to start the process of refining those priorities into goals and strategies—and engaging your key stakeholders along the way.

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STRATEGIC PLANNING FUNDAMENTALS

TERMINOLOGY

Organizations often get caught up in the semantics of a strategic plan. What's the difference between a goal, a strategy, and an objective? Why do we need so many categories? Create clear definitions at the beginning of the process and then refer back to them as you navigate your roadmap on the following pages.

This is how we define the progression from Priorities to Goals to Action Items:

	PRIORITIES	GOALS	STRATEGIES	OBJECTIVES	ACTION ITEMS
WHAT	Big picture opportunities and core issues. Priorities are the starting point.	Broad, measurable outcomes.	The approaches you take to achieve a goal.	Annual goals. Measurable steps to achieve strategies.	Day-to-day activities to meet objectives.
WHO	Staff Leadership, Board, Stakeholders	Staff, Board, Stakeholders	Staff, Board, Stakeholders	Staff Leadership	Staff Leadership and Staff Members

ROLES AND RESPONSIBILITIES

One of the benefits of a good strategic plan is that it defines the roles of the board and staff. An effective board of directors or board of trustees should focus on the big picture—the mission, vision, measures of success, and high-level goals and strategies. Executive staff leadership is involved here as well.

Board members should not be involved in the day-to-day operation of an organization. For this reason, objectives and action items (the implementation of the strategic plan) should be the responsibility of staff leadership and all staff members.

WHO IS RESPONSIBLE?



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STRATEGIC PLANNING ROADMAP

This worksheet is designed to be filled in electronically. Simply follow the prompt in each box and type directly into the space provided. Then, print the page for your records and use the information to launch your strategic planning process.

1

ASSEMBLE STRATEGIC PLANNING COMMITTEE



2

DETERMINE PRIORITIES



3

CONDUCT INTERVIEWS



4

CONDUCT ELECTRONIC SURVEY



5

CONDUCT SWOT ANALYSIS

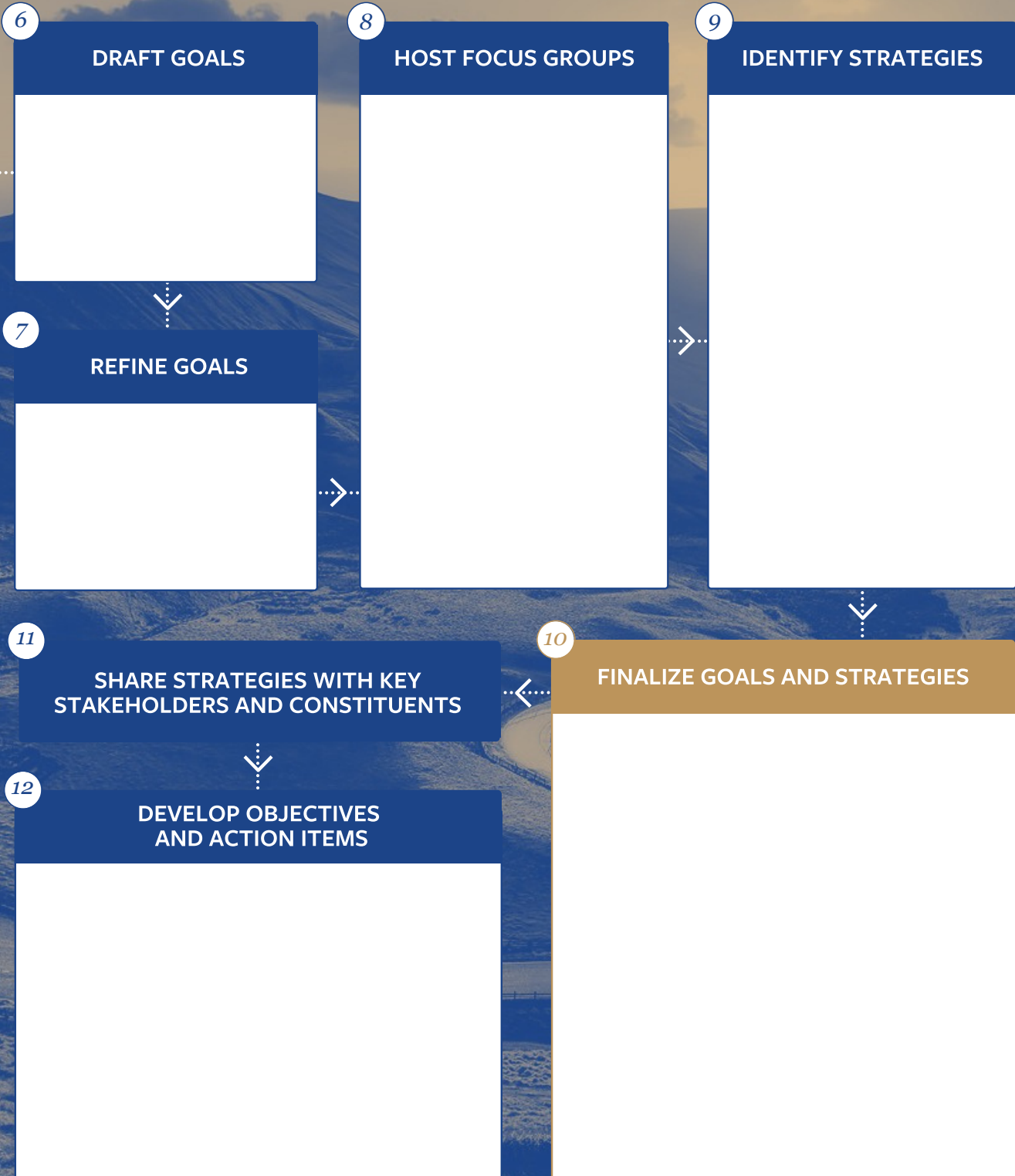


NOT SURE WHAT TO DO FIRST?

Get a [recommendation from a Winkler Group expert](#). We will review your unique situation and help you map a plan to get started.



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STRATEGIC PLANNING ROADMAP



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DON'T WASTE THIS OPPORTUNITY FOR LASTING CHANGE

We will never have an opportunity like this again.

The chance to step back and re-evaluate all aspects of our operation and the way we achieve our mission. Capitalize on this rare opportunity and emerge stronger by drafting a new or a revised strategic plan based on what you've learned.



THE VALUE OF A PARTNER



Your strategic plan will be more effective if you use outside counsel to develop it. A skilled strategic planning partner, like the Winkler Group, will guide you through the process and help you avoid the pitfalls that commonly derail the strategic planning process.

A consultant gathers and synthesizes data, without the natural bias an insider may bring. They will bring objectivity to the process and moderate tough discussions. And, your key stakeholders will tell a consultant things they won't tell you.

Finally, an outside consultant provides accountability for implementation. By following up at periodic intervals, they can make sure the plan is reaching critical milestones. And even if the process begins to lag behind, a good consultant will help you get the plan back on track, taking the burden off of a team with a lot on their plate already.

If you are struggling to get started, let us guide you through the first step.

One of our strategic planning experts will make customized recommendations. In only 15 minutes, you'll have easy-to-implement ideas that will put you on the path towards strategic success.

Schedule a FREE strategy session today!

SCHEDULE

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