# Turning Disruption into Opportunity THE 2021 STRATEGIC PLANNING TOOLKIT

## Winkler Group – Fueling Your Vision

[www.winklergroup.com](http://www.winklergroup.com)

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 reexamine 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.

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.

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com

## The 2021 Strategic Planning Toolkit 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.

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com

# The 2021 Strategic Planning Toolkit 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: Big picture opportunities and core issues. Priorities are the starting point.

WHO: Staff Leadership, Board, Stakeholders

GOALS: Broad, measurable outcomes

WHO: Staff, Board, Stakeholders

STRATEGIES: The approaches you take to achieve a goal.

WHO: Staff, Board, Stakeholders

OBJECTIVES: Annual goals, Measurable steps to achieve strategies.

WHO: Staff Leadership

ACTION ITEMS: Day-to-day activities to meet objectives.

WHO: 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-today 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?

Board and Leadership Goals and Strategies Board Mission and Vision Leadership and Staff Objectives and Action Items GOALS STRATEGIES OBJECTIVES ACTION ITEMS The approaches you take to achieve a goal. Annual goals. Measurable steps to achieve strategies. Day-to-day activities to meet objectives. Staff, Board, Stakeholders Staff, Board, Stakeholders Staff Leadership Staff Leadership and Staff Members

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com

# The 2021 Strategic Planning Toolkit 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.

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.

1 ASSEMBLE STRATEGIC PLANNING COMMITTEE

Identify 6 – 8 individuals that will form the strategic planning committee.

## 2 DETERMINE PRIORITIES

Determine 6 -8 potential big picture items to focus on over the next 3 -5 years

## 3 CONDUCT INTERVIEWS

Interview 18 – 25 key stakeholders for feedback on draft priorities

## 4 CONDUCT ELECTRONIC SURVEY

Identify constituencies to gain feedback on priorities.

## 5 CONDUCT SWOT ANALYSIS

Identify 15-18 participants (e.g., stakeholders, community leaders) to participate in a SWOT analysis.

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com

# The 2021 Strategic Planning Toolkit STRATEGIC PLANNING ROADMAP

## 6 DRAFT GOALS

Draft 5-7 potential goals based on feedback to date.

## 7 REFINE GOALS

Narrow down and refine goals from Step 6. List the 3-5 biggest goals here.

## 8 HOST FOCUS GROUPS

Identify 20-25 individuals to provide feedback on goals.

## 9 IDENTIFY STRATEGIES

List 2-3 potential strategies per goal.

## 10 FINALIZE GOALS AND STRATEGIES

Finalize goals and strategies here.

## 11 SHARE STRATEGIES WITH KEY STAKEHOLDERS AND CONSTITUENTS

## 12 DEVELOP OBJECTIVES AND ACTION ITEMS

Begin developing objectives, action items, and measures for success for each strategy.

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com

# The 2021 Strategic Planning Toolkit 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!](https://winklergroup.com/schedule-time-with-us/)

[SCHEDULE](https://winklergroup.com/schedule-time-with-us/)

Full-service Strategic Planning and Capital Campaign Firm Headquartered in South Carolina, with offices in Florida, Georgia, New York, and North Carolina [www.winklergroup.com](http://www.winklergroup.com) | 843-849-6256 | info@winklergroup.com