

Strategic Planning: an overview

Guidance for beginning the strategic planning process

This is where you get to dream big and shape your business or vision exactly the way you want, and then identify key steps to make that happen. This is the foundation of your business plan and a vital component to securing funding, engaging other people in your dream, and staying true to your own principles.

Your strategic plan consists of four key pieces:

VALUES

These are the non-negotiables in the way you do everything in business. They are your litmus test and initial screening for everything from your strategic goals to how you select clients.

MISSION

This is how you communicate what you do, why you do it, how, and for whom. It's your quickest "elevator pitch" and a fast way to describe your business. It's also foundational for guiding your everyday activities.



VISION

Your vision is ambitious and aspirational. It's what the world looks like when your mission delivery is on target and basically, when everyone does what you think they should do (aka my perfect world).



GOALS

How will you know you're achieving your mission (or not)? With measurable goals. This is how you'll prove to yourself, your clients, your stakeholders, and the public that you are doing what you set out to do.



Strategic Planning Jumpstart

writing prompts



values

What are some characteristics you admire in other people? What do you consider some of your best traits? If you could run your business exactly the way you want, what would the culture be?

mission

What does your business do in clear words and phrases? Who are your ideal clients? Why are you called to be in business? How do you deliver?

vision

Your vision statement should answer the question: When I have done my job well (or my business has delivered perfectly on mission), what does the entire world look like? Be specific and think about how your clients' lives will have changed.

goals

Your goals will arise out of your work on mission, vision, and values. When you have arrived at those strategic statements, your goals may show up organically. They will at least be guided and clarified. Goals should start at a high level and then get distilled down to daily action steps.

other questions to ask yourself

- Who is your ideal client, and what is their life like before and after their interaction with you?
- What's the problem that you solve for your customers?
- What are your clients looking for when they come to you?
- What kind of image do you want to project?
- What are you working toward right now?
- What inspires you, your teams, clients, customers, and stakeholders?
- What is unique about your business?

