

# Strategic Planning 101

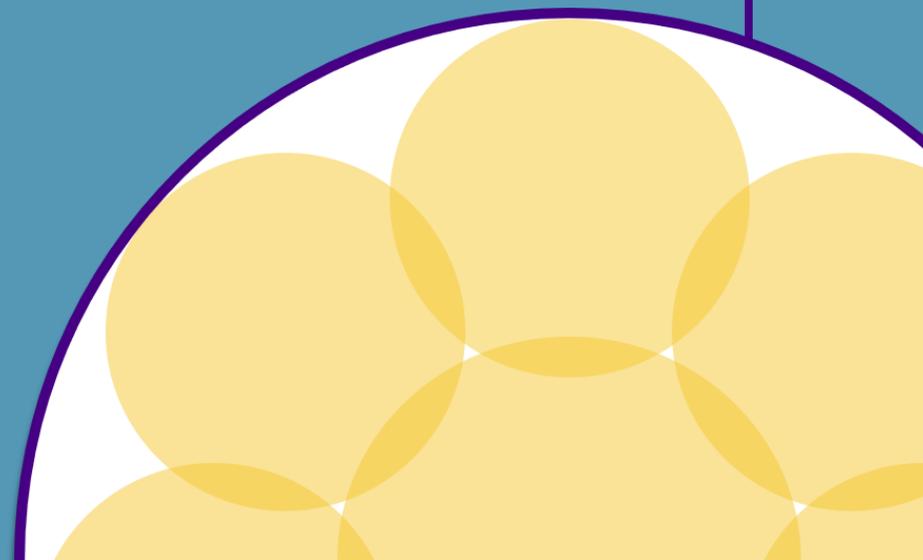
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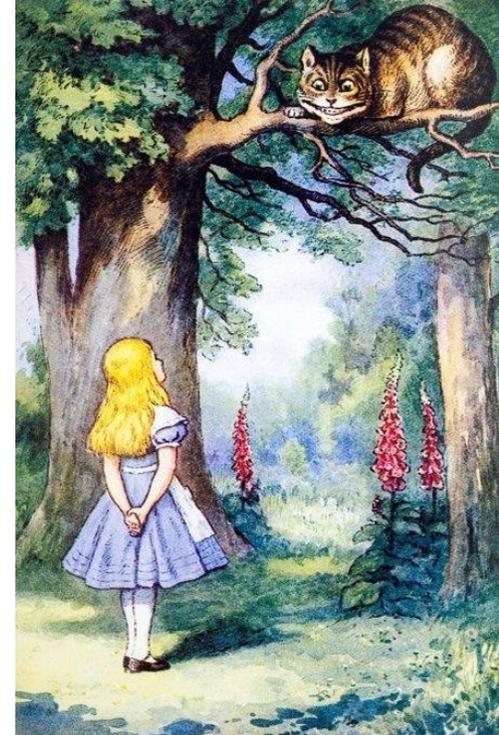
# Objectives

After the session, participants will:

1. Understand the purpose of strategic planning.
2. Be able to identify the differences between strategic planning components.
3. Understand the basics of:
  - Creating mission, vision and value statements.
  - Facilitating a SWOT analysis.
  - Writing goals and objectives that fit the SMART goal model.

# Alice in Wonderland

- Cat: Where are you going?
- Alice: Which way should I go?
- Cat: That depends on where you are going.
- Alice: I don't know.
- Cat: Then it doesn't matter which way you go.



# Strategic Planning

Strategic planning is an organization's process of defining its strategic direction and making decisions on allocating its resources to pursue that strategy. (Wikipedia). Components include:

- Mission
- Vision
- Values
- SWOT Analysis (optional)
- Goals, Objectives and Action Steps
- Key Performance Indicators (KPIs) and Action Items (optional)

# Strategic Planning Phases

1

Mission

Vision

Values

2

Goals

Objectives

Action Steps

3

KPIs

Action Items

# Strategic Planning Phases

1

Vision

2

Strategic Objectives  
(aka Goals)

Supporting Initiatives  
(aka Strategies)



# Strategic Planning in One Slide

- Mission
  - Your enduring purpose; why you exist; what you do every day
- Vision
  - Your largest overarching goal; should be inspiring and demonstrate how the world is going to be different in 3-5 years because of the work you are doing
- Values
  - Beliefs, principles or standards of behavior that demonstrate how you do what you do and what it takes to be successful on your team
- Goals
  - Critical targets that must be achieved to realize your Vision
- Objectives
  - Measurable actions you are going to take to achieve your Goals

# Key Concepts

- Doritos
- Consensus vs. Buy-in
  - Consensus: general agreement; unanimity
  - Buy-in: acceptance and willingness to actively support and participate in something
- 80% rule

# Strategic Planning

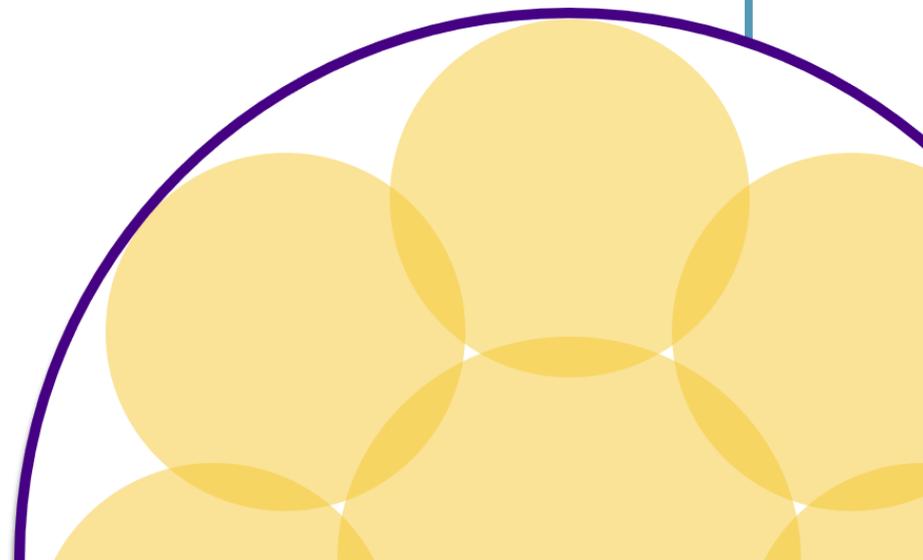
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# Mission Statements



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# Mission Statement (for them)

The mission statement is the most important component of a strategic plan. It states the purpose of the organization and answers the question, "Why do we exist?"

- Short – 1 to 2 sentences
- Understandable
- Rarely, if ever, changes
- Answers the questions
  - What?
  - How?
  - To/For Whom?

# Mission Statement #1

*Our mission is to make feel-good moments easy for everyone.*

# Mission Statement #2

*We aim to build a better world – helping people live better and renew the planet while building thriving, resilient communities.*

# Mission Statement #3

*To bring inspiration and innovation to every athlete\* in the world.*

# Mission Statement #4

*Organize the world's information and make it universally accessible and useful.*

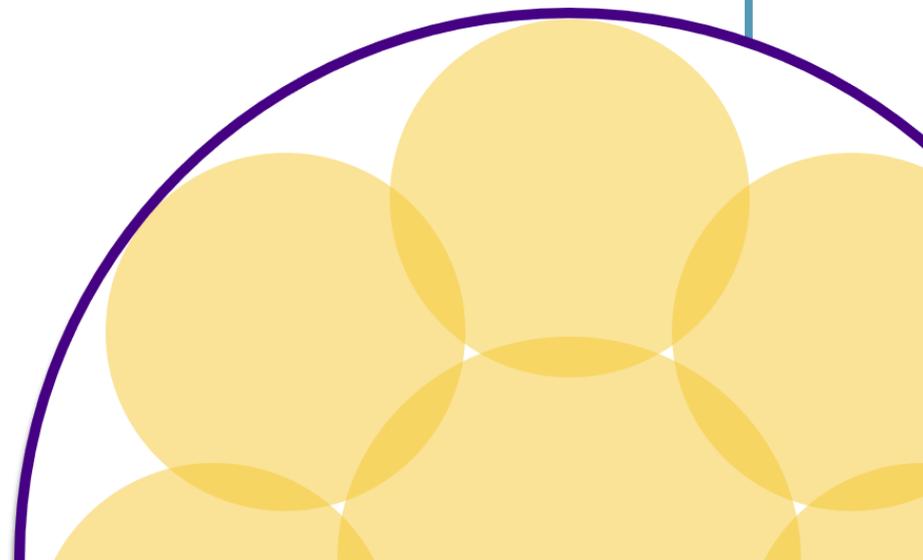
# Mission Statement #5

*To bring the best user experience to customers through innovative hardware, software, and services.*

# Vision Statements



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# Vision Statement (for you)

The vision statement is the next big goal on the horizon – a goal that will assist and organization in achieving its mission. It is aspirational in nature and should reflect the most important next step.

- Should inspire and direct
- Answers the question "Where do we want to go?"
- Will hopefully change!

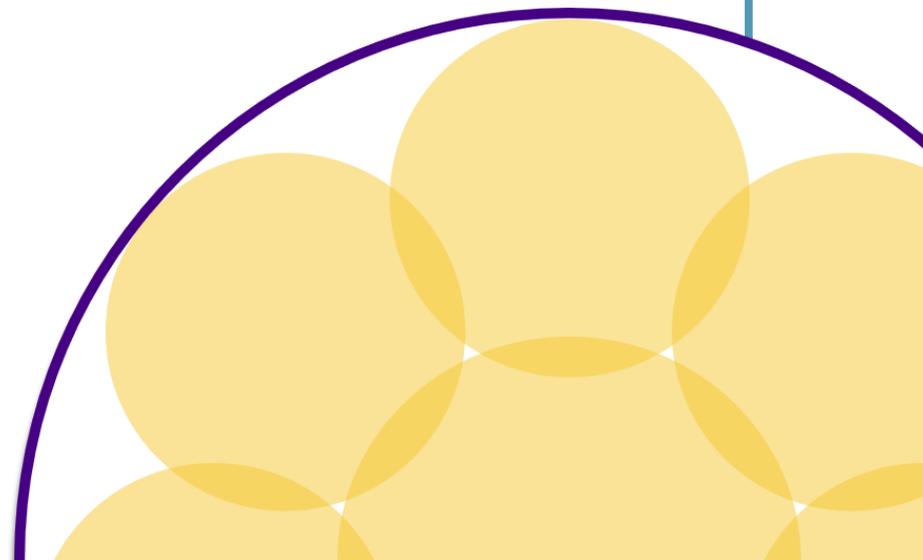
# The Coca-Cola Company

Our vision is to craft the brands and choice of drinks that people love, to refresh them in body & spirit. And done in ways that create a more sustainable business and better shared future that makes a difference in people's lives, communities and our planet.

# Value Statements



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# Value Statements

Value statements list the core principles that guide and direct the organization and its culture.

- No more than 3 to 5
- Can be words or statements (statements recommended)
- Answer the questions:
  - What principles do we believe in?
  - What behaviors matter the most?
  - How do we treat people?
  - How do we want others to describe us and our work?

# The Coca-Cola Company Values

- CURIOUS

- Exploring, understanding, connecting, imagining, wondering about how it could be better or different
- Woodruff quote: “Future belongs to the discontentd”

- EMPOWERED

- Accountability and action
- Consideration and prioritization

- INCLUSIVE

- Draw on diverse talent and experience to improve ideas
- Coupling individual thought with great team interaction

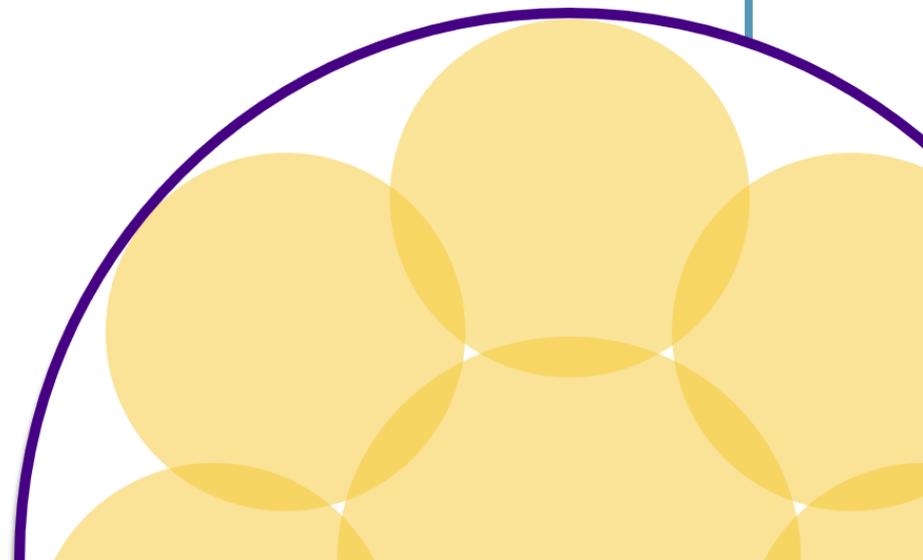
- AGILE

- Learn by doing, use version 1.0, 2.0, 3.0
- Take a more iterative, real-world approach

# SWOT Analysis



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What is

# SWOT Analysis ?



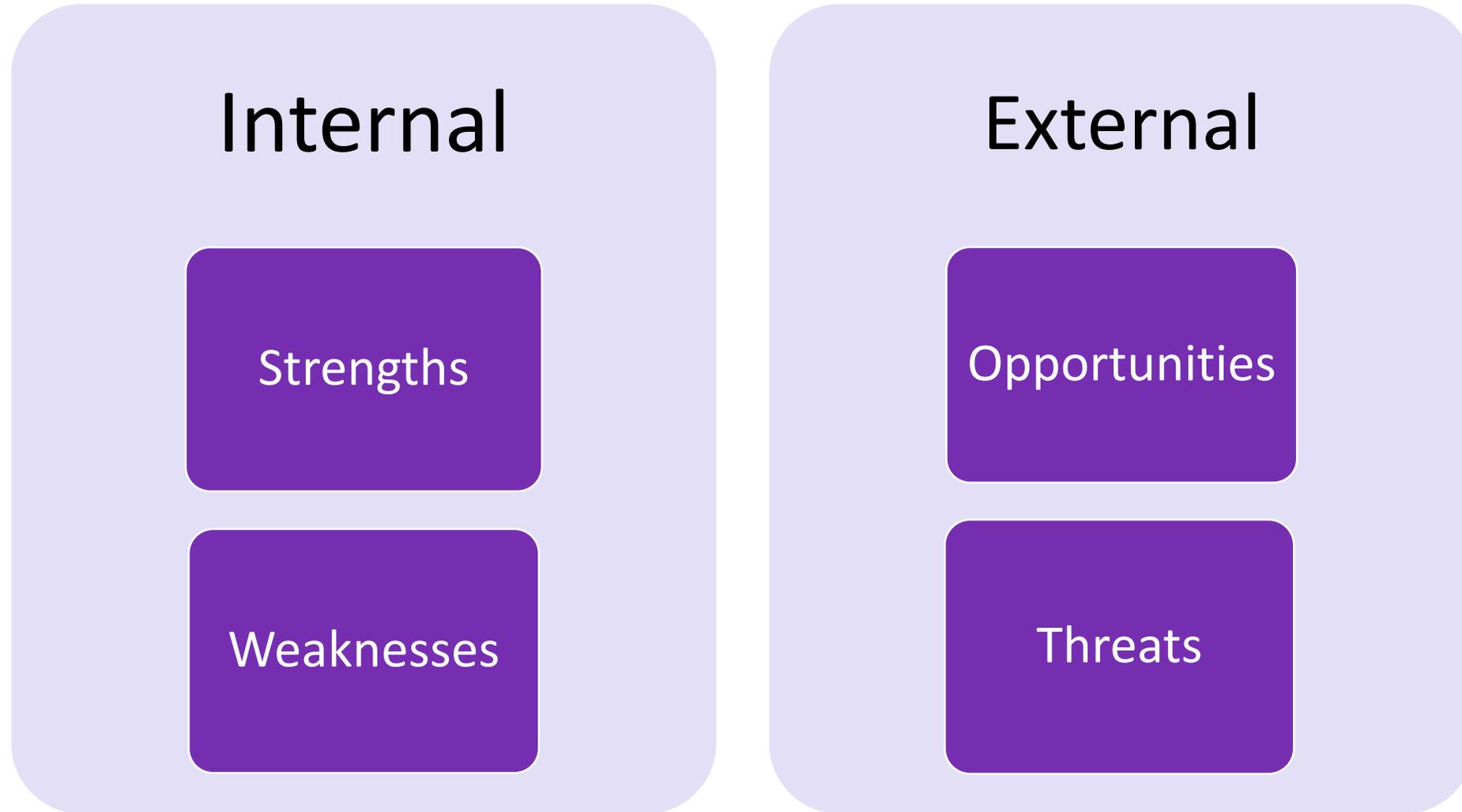
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# SWOT Analysis

A SWOT analysis gives you an accurate picture of the current state of the organization.

- **Strengths:** In the context of accomplishing your mission, what are you doing well?
- **Weaknesses:** In the context of accomplishing your mission, what are you not doing well?
- **Opportunities:** In the context of accomplishing your mission, what are some known or potential opportunities?
- **Threats:** In the context of accomplishing your mission, what are some known or potential threats that could keep you from being successful?

# SWOT



# Strengths

- In light of your mission, vision, and values, what's working well?
- What systems/processes work well?
- Which elements seem to be working most effectively?
- What self-talk that you hear is positive? Where are the victories? Recognitions?
- What would an outsider looking in characterize as your positive attributes?
- About what are you most proud?

# Weaknesses

- What processes don't seem to be working from your perspective?
- What complaints/concerns/criticisms are you hearing?
- What does the community appear to need from you that it's not receiving?
- Is there a hesitation to change or innovate? A lack of strong leadership? Under staffing or resourcing?

# Opportunities

- What changes do you foresee that give you a chance to make important mission-related advances?
- What current problems/challenges do you think you can turn into successes/wins?
- How will potential external (policy, legislation, market) trends support you?
- What ideas or plans do you have to be more effective?
- How are things changing to your advantage?

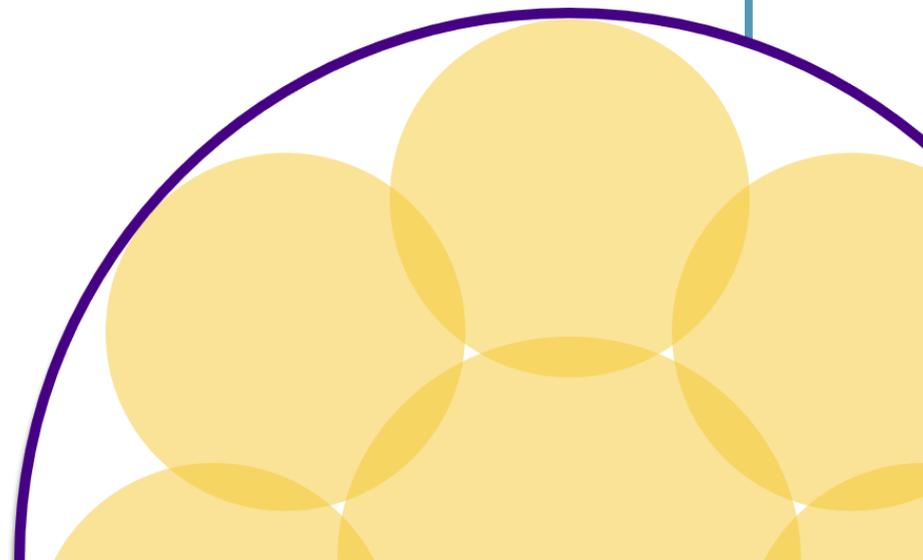
# Threats

- What legislative/policy changes have the chance to negatively impact you if you don't react appropriately?
- What current "problems" have the risk of harming long-term success if you don't react appropriately?
- In what areas are things apparently stagnant, not staying ahead of community needs?
- Are personnel reticent to change? To innovate? What kinds of threats does a lack of creativity or a fear of change present?

# Goals & Objectives



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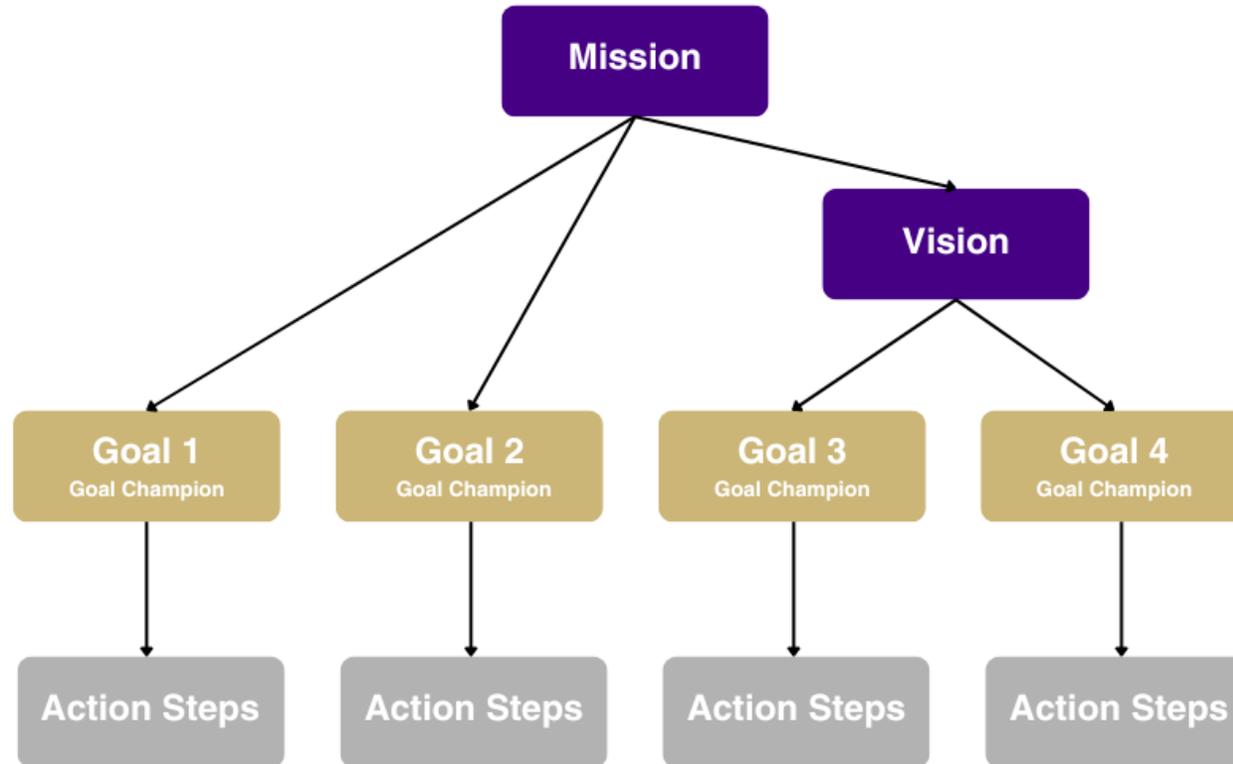


# Goals and Objectives

Goals and objectives communicate how an organization is going to accomplish its mission and vision. They provide direction on decision-making and resource allocation and give employees insight into how their work ties into the organization's purpose.

- Goal: An organization's aim or desired result
- Objective: A specific measurable step toward achieving a goal
- Short-term (up to 2 years) and long-term (3+ years)
- Should include actions steps and goal champions

## STRATEGIC PLANNING CHART



# SMARTer Goals

- Bad goal #1: Become a better communicator.
- Bad goal #2: Lose weight.
- Bad goal #3: Solve the homelessness problem in the community.

	<b>S</b>	<b>Specific:</b> The goal must be very specific and grounded in something that's significant to you.
	<b>M</b>	<b>Measurable:</b> The goal must have some sort of measurement (days, pounds, miles, etc.).
	<b>A</b>	<b>Achievable:</b> The goal must be realistic and reasonable.
	<b>R</b>	<b>Relevant:</b> The goal must relate to what you're hoping to accomplish.
	<b>T</b>	<b>Time-bound:</b> The goal must have a timeframe and that timeframe must be reasonable.

# A Coca-Cola Company Goal (Generated by ChatGPT)

- Reduce Coca-Cola's single-use plastic packaging by 25% globally by the end of 2028 through innovations in packaging, recycling programs and consumer engagement initiatives.
  - Objective 1: Innovate packaging design
    - 1.1: Invest in R&D to scale production of 100% recycled PET bottles or biodegradable materials by mid-2025.
    - 1.2: Pilot new eco-friendly packaging in 5 major markets (e.g., U.S., Brazil, India, Germany, Japan) by the end of 2026.
    - 1.3: Replace 50% of single-use plastic packaging in flagship brands with sustainable alternatives by 2027.
  - Objective 2: Expand recycling infrastructure
  - Objective 3: Engage consumers in sustainable behavior
  - Objective 4: Monitor and report progress transparently

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