

Strategic Planning 101

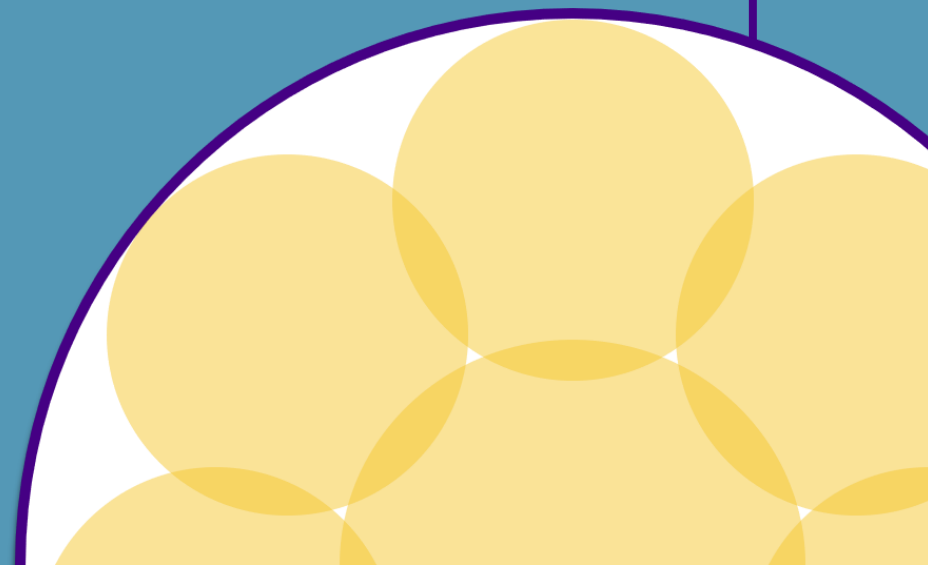
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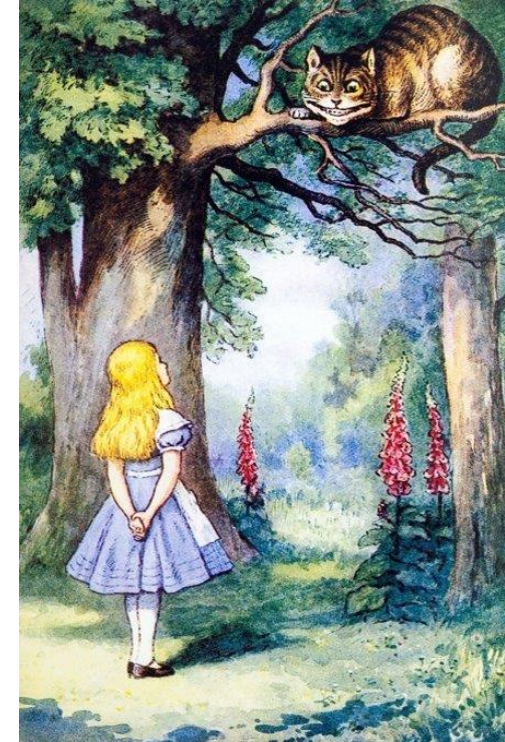
Objectives

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

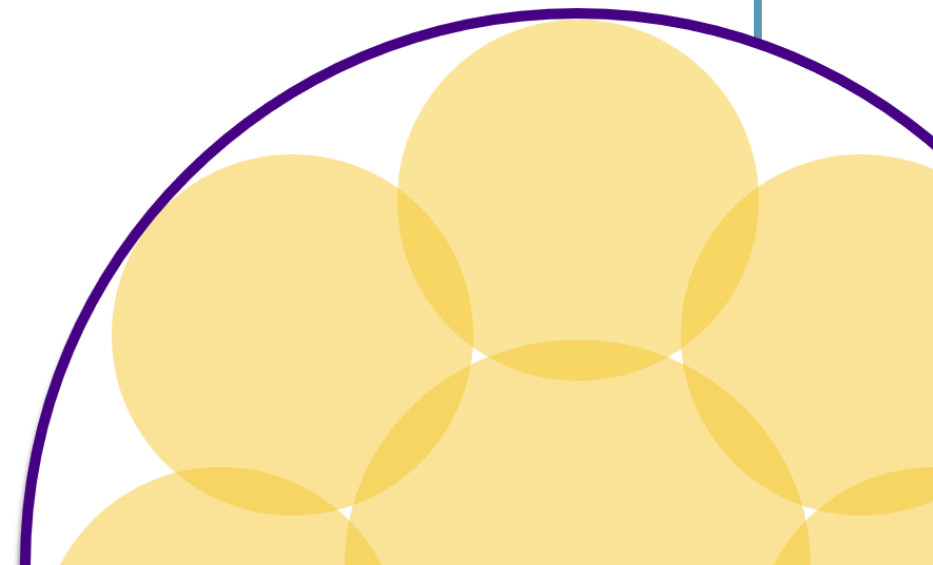
- Doritos
- Consensus vs. Buy-in
 - Consensus: general agreement; unanimity
 - Buy-in: acceptance and willingness to actively support and participate in something
- 80% rule

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Mission Statements



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



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!

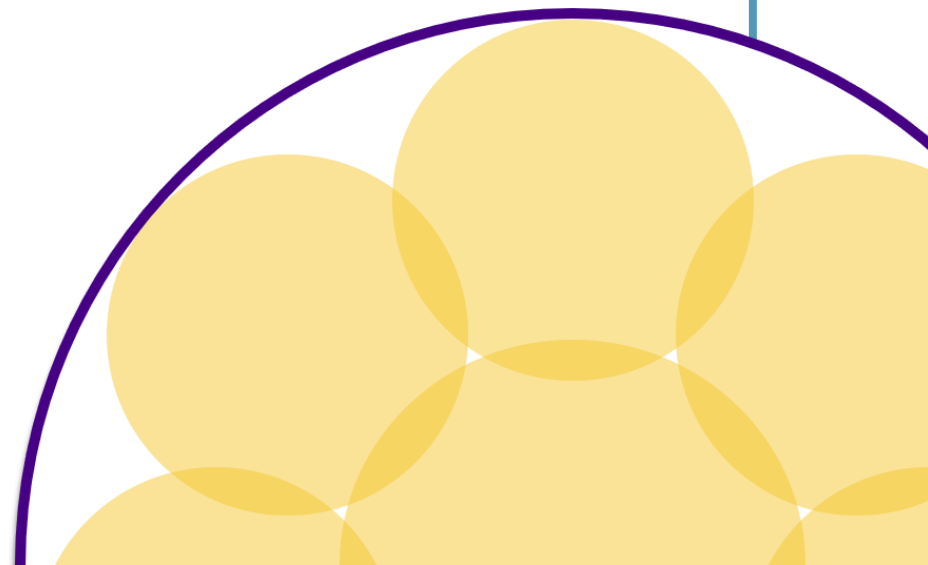
The Coca-Cola Company

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

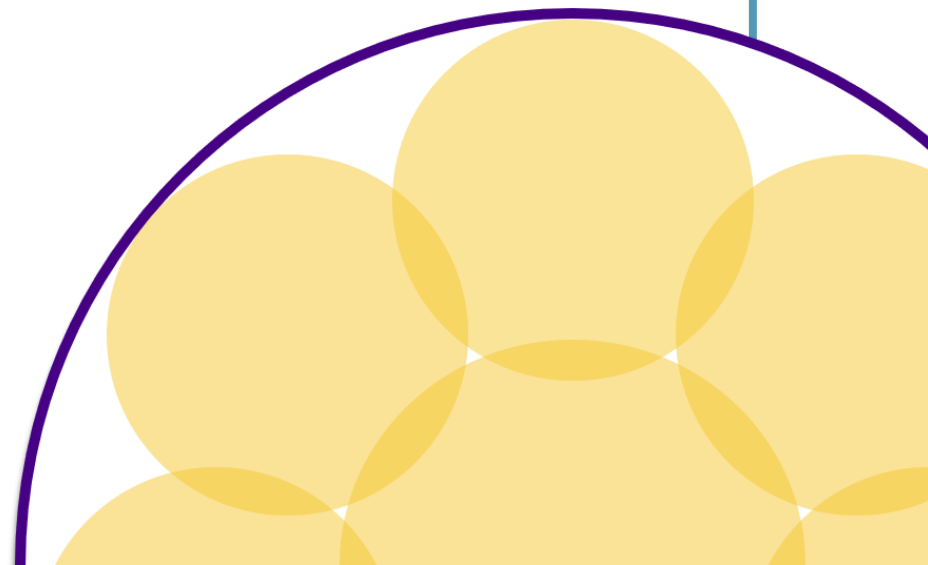
- AGILE

- 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

Internal

Strengths

Weaknesses

External

Opportunities

Threats

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?

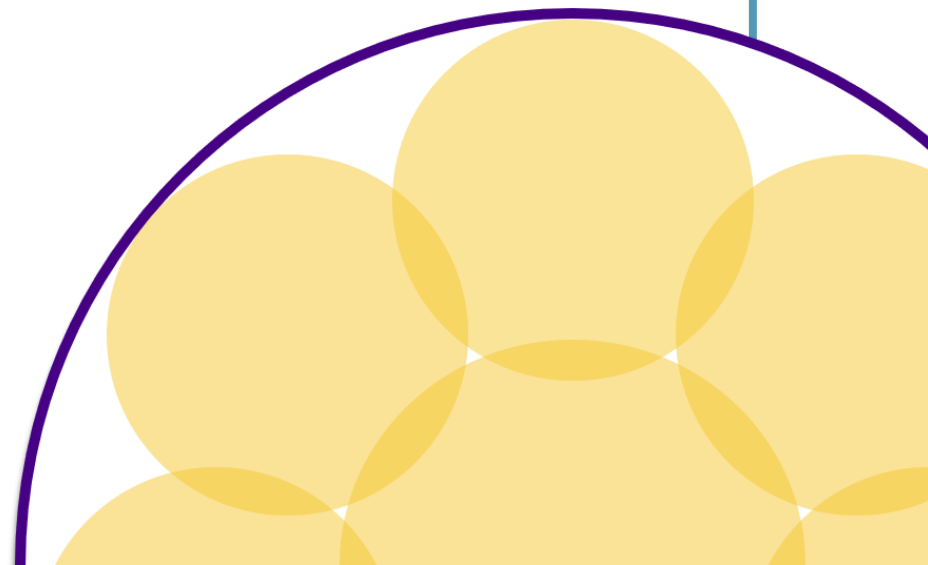
Threats

- 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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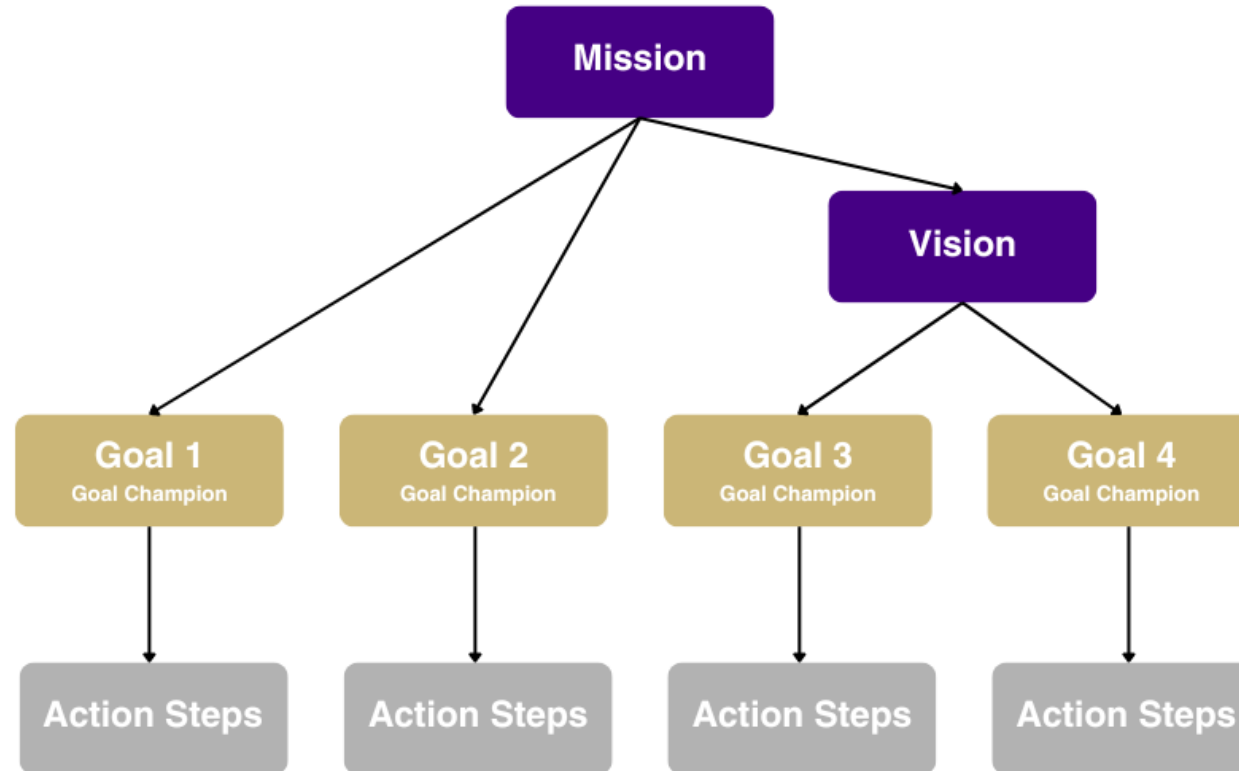


Goals and Objectives

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.

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