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Project Scorecard Exercise182. Project Management Scorecard183. Problem Statement Exercise184. Problem Statement Template185. KPI Worksheet186. Terms of UseThis HR strategy presentation template is 186 PowerPoint slides of hr & org strategy storylines, plans, frameworks, org charts, analysis, icons, examples, templates, and more. Designed by human resource leaders and McKinsey consultants, the HR strategic plan template covers HR strategy, org strategy, org design, strategic alignment, financials, the employee journey (hiring, onboarding, development, evaluation, advancement), HR plans & initiatives, culture, values, compensation design, and much more.Your HR & organizational strategy and plan are critical to you. Your time and energy are precious. Get a massive jumpstart on your HR strategy and presentation by instantly downloading the HR strategy template now with professionally designed and easy-to-edit slides and three color palettes included. Elevate your presentations with professionally designed slides and unleash the potential of your HR planning and strategy-building endeavors. Here is just a sneak peek of what the human resources strategy template contains :-Human Resources & Organizational StrategyThis section covers the fundamental building blocks of your HR strategy, including the clear articulation of your HR team's mission.Company Organization & StructureGain clarity and insight into your company's organizational structure with comprehensive org charts, visualize your workforce distribution with US and world headcount maps, and evaluate key organizational metricsHeadcount & Workforce ManagementDive into headcount analysis to make informed decisions about workforce management, explore headcount reduction strategies, and design career ladders to foster employee growth.Employee Journey & EngagementBuild an engaged and productive workforce by improving the employee journey through efficient hiring, seamless onboarding, continuous development initiatives, and understanding employee sentiments with survey results.Talent Acquisition & DevelopmentDiscover the power of an effective talent acquisition funnel to attract and retain top talent, utilize 5C onboarding strategies to ensure a successful integration, and develop employees with thoughtful initiatives for continuous growth.Human Capital Management (HCM) & TechnologyStrategize your Human Capital Management (HCM) with a comprehensive platform strategy, effectively plan HCM projects, and navigate organizational change with a robust change in human resources strategic plan template.Culture & CompensationElevate your company culture and compensation design with frameworks that reinforce your values, and utilize scorecards to track the effectiveness of culture initiatives.Core Values & Core CompetenciesDefine and uphold your core values, align your core competencies with your organizational strategy, and develop initiatives to strengthen these foundational elements.Performance & Strategy FrameworksEnsure alignment across your organization with cascading goals and KPIs, utilize milestone frameworks to track progress, and leverage powerful 3-box frameworks for strategic decision-making.Employee Certification & Assessment Implement employee certification processes for skill validation and use employee assessment strategies to identify potential and areas of growth.Company Norms & Employee StrategyEstablish company norms for effective collaboration, and design a cohesive employee journey strategy that aligns with your organizational goals.Retention Initiatives & High Performing TeamsImplement retention strategies to nurture talent, create team charters to foster high performing teams, and drive a culture of continuous improvement.Company Culture Initiatives & Employee Diagnostic ResultsDrive cultural transformation with well-defined culture initiatives, and gain valuable insights intoyour organization's strengths and areas for improvement through employee diagnostic surveys.Compensation Framework & Procurement PrioritizationCraft a comprehensive compensation framework that aligns with your organizational goals, and prioritize strategic procurement to optimize resource allocation with this human resources strategic plan template.Project Planning & Problem Statement ExerciseUtilize project planning templates to ensure successful execution of your HR initiatives, and conduct problem statement exercises to address organizational challenges effectively.Aligning your HR strategy with the company's long-term goals requires a thoughtful approach. Start by understanding the company's strategic objectives and identifying how HR can contribute to achieving them. Utilize the HR Strategy Agenda Slide to create a clear roadmap with specific action items and initiatives. Engage in discussions with key stakeholders to ensure that your HR initiatives are in sync with the overall organizational goals.As your company expands globally, it's crucial to visualize your workforce distribution to make informed decisions. The US Org Headcount Map and World Headcount Map slides can be incredibly valuable in this situation. Use these maps to depict the distribution of employees across different regions, providing a clear understanding of your global workforce footprint. This visualization will help identify areas with high talent concentration, potential skill gaps, and opportunities for further expansion.Yes, we have a template that can be a valuable resource during a restructuring process. The Headcount Chart and Headcount by Function Chart slides provide an in-depth analysis of your organization's current headcount and the distribution of employees across different functions. This data can aid in identifying areas where headcount adjustments may be needed. Additionally, the Manager Headcount Reduction slide can help you focus on managerial positions that may need adjustments during the restructuring.Absolutely! The template offers flexibility, and you can easily customize the slides to match your organization's branding, such as using specific colors, logos, and fonts. A one-time analysis of your practice might provide a temporary fix, but without the proper follow-up, it will not be a long-term solution. This means wasted time and money.To achieve and maintain real efficiency and improved profitability, you need a systematic approach to evaluation, feedback, and implementation. Our experience has shown that, if not monitored, bad habits will return over time. We set goals and establish high expectations for employees. This ensures that the entire staff, including office managers and physicians, is providing quality service to patients in the most efficient manner possible.Allow us to focus on the business of your practice so you can focus on your patients. Contact us today and discover how you and your practice can benefit from our programs. Strategic planning is an organizational activity that aims to achieve a group's goals. The process helps define a companys objectives and investigates both internal and external happenings that might influence the organizational path. Strategic planning also helps identify adjustments that you might need to make to reach your goal. Strategic planning became popular in the 1960s because it helped companies set priorities and goals, strengthen operations, and establish agreement among managers about outcomes and results. Strategic planning can occur over multiple years, and the process can vary in length, as can the final plan itself. Ideally, strategic planning should result in a document, a presentation, or a report that sets out a blueprint for the companys progress. By setting priorities, companies help ensure employees are working toward common and defined goals. It also aids in defining the direction an enterprise is heading, efficiently using resources to achieve the organizations goals and objectives. Based on the plan, managers can make decisions or allocate the resources necessary to pursue the strategy and minimize risks. Strategic planning strengthens operations by getting input from people with differing opinions and building a consensus about the companys direction. Along with focusing energy and resources, the strategic planning process allows people to develop a sense of ownership in the product they create. Strategic planning is not a to-do list for the short or long term it is the basis of a business, its direction, and how it will get there. You have to think very strategically about strategic planning. It is more than just following steps, Bryson explains. You have to understand your desired outcomes and the kinds of magic solution to fixing issues. Dont have unrealistic expectations. Strategic planning is also different from a business plan that focuses on a specific product, service, or program and short-term goals. Rather, strategic planning means looking at the big picture. While they are related, it is important not to confuse strategic planning with strategic thinking, which is more about imagining and innovating in a way that helps a company. In contrast, strategic planning supports those thoughts and helps you figure out how to make them a reality. Another part of strategic planning is tactical planning, which involves looking at short-term efforts to achieve longer-term goals. Lastly, marketing plans are not the same as strategic plans. A marketing plan is more about introducing and delivering a service or product to the public instead of how to grow a business. For more about marketing plans and processes, read this article. Strategic plans include information about finances, but they are different from financial planning, which involves different processes and people. Financial planning templates can help with that process. In todays technological age, strategic plans provide businesses with a path forward. Strategic plans help companies thrive, not just survive they provide a clear focus, which makes an organization more efficient and effective, thereby increasing productivity. Getting team members on the same page (in both creating a strategic plan and executing the plan itself) can be beneficial for a company. Planners can find satisfaction in the process and unite around a common vision. In addition, you can build strong teams and bridge gaps between staff and management. You have to reach agreement about good ideas, Bryson says. A really good strategy has to meet a lot of criteria. It has to be technically workable, administratively feasible, politically acceptable, and legally, morally, and ethically defensible, and that is a pretty tough list. By discussing a companys issues during the planning process, individuals can voice their opinions and provide information necessary to move forward.As a result of problem solving as a group. Strategic plans also provide a mechanism to measure success and progress toward goals, which keeps employees on the same page and helps them focus on the tasks at hand. There is no perfect time to perform strategic planning. It depends entirely on the organization and the external environment that surrounds it. However, here are some suggestions about when to plan: If your industry is changing rapidly When an organization is launching At the start of a new year or funding period In preparation for a major new initiative If regulations and laws in your industry are or will be changing Its not like you do all of the thinking and planning, and then implement, Bryson says. A mistake people make is [believing] the thinking has to precede the acting and the learning. Even if you do not re-create the entire planning process often, it is important to periodically check your plan and make sure it is still working. If not, update it. Strategic planning is a process, and not an easy one. A key is to make sure you allow enough time to complete the process without rushing, but not take so much time that you lose momentum and focus. The process itself can be more important than the final document due to the information that comes out of the discussions with management, as well as lower-level workers. Level 1 is the Strategic Planning Professional (SPP) certification. It is designed for early- or mid-career planners who work in strategic planning. Level 2, the Strategic Management Professional (SMP) certification, is geared toward seasoned professionals or those who train others. Stockmal explains that ASP designed the certification programs to add structure to the otherwise amorphous profession. The strategic planning process varies by the size of the organization and can be formal or informal, but there are common components. For example, teams of all sizes and goals should build in many points along the way for feedback from key leaders this helps the process stay on track. Some elements of the process might have specific start and end points, while others are continuous. For example, there might not be one aha moment that suddenly makes things clear. Instead, a series of small moves could slowly shift the organizational direction. 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For work as crucial as strategic planning, it is necessary to get the right team together and include them from the beginning of the process. Try to include as many stakeholders as you can. Below are suggestions on who to include: Senior leadership Strategic planners Strategists People who will be responsible for implementing the plan People to identify gaps in the plan Members of the board of directors There can be magic to strategic planning, but its not in any specific framework or anybodys 10-step process, Bryson explains. The magic is getting key people together, getting them to focus on whats important, and [getting] them to do something about it. Thats where the magic is. Hofmeyer recommends finding people within an organization who are not necessarily current leaders, but may be in the future. Sometimes they just become obvious. Usually they show themselves to you, you dont need to look for them. Theyre motivated to participate, he says. These future leaders are the ones who speak up at meetings or on other occasions, who put themselves out there even though it is not part of their job description. At the beginning of the process, establish guidelines about who will be involved and what will be expected of them. Everyone involved must be willing to cooperate and collaborate. If there is a question about whether or not to include anyone, it is usually better to bring on more people. Other parts of a strategic plan can include the following: Description: A description of the company or organization. Vision Statement: A bold or inspirational statement about where you want your company to be in the future. Mission Statement: In this section, describe what you do today, your audience, and your approach as you work toward your vision. Core Values: In this section, list the beliefs and behaviors that will enable you to achieve your mission and, eventually, your vision. Goals: Provide a few statements of how you will achieve your vision over the long term. Objectives: Each long-term goal should have a few one-year objectives that advance the plan. Make objectives SMART (specific, measurable, achievable, and time-based) to get the most out of them. Budget and Operating Plans: Highlight resources you will need and how you will implement them. Monitoring and Evaluation: In this section, describe how you will check your progress and determine when you achieve your goals. One of the first steps in creating a strategic plan is to perform both an internal and external analysis of the companys environment. Internally, look at your companys strengths and weaknesses, as well as the personal values of those who will implement your plan (managers, executives, board members). Externally, examine threats and opportunities within the industry and any broad societal expectations (for example, technological advances or changing demographics). You can perform a SWOT (strengths, weaknesses, opportunities, and threats) analysis to sum up where you are currently and what you should focus on to help you achieve your future goals. Strengths shows you what you do well, weaknesses point out obstacles that could keep you from achieving your objectives, opportunities highlight where you can grow, and threats pinpoint external factors that could be obstacles in your way. You can find more information about performing a SWOT analysis and free templates in this article. Another analysis technique, STEEPLE (social, technological, economic, environmental, political, legal, and ethical), often accompanies a SWOT analysis. How you navigate the strategic planning process will vary. Several tools and techniques are available, and your choice depends on your companys leadership, culture, environment, and size, as well as the expertise of the planners. All include similar sections in the final plan, but the ways of driving those results differ. Some tools are goals-based, while others are issues- or scenario-based. Some rely on a more organic or rigid process. Hofmeyer summarizes what goes into strategic planning: Understand the stakeholders and involve them from the beginning. Agree on a vision. Hold successful meetings and sessions. Summarize and present the plan to stakeholders. Identify and check metrics. Make periodic adjustments. Strategic planning contains inputs, activities, outputs, and outcomes. Inputs and activities are elements that are internal to the company, while outputs and outcomes are external. Remember, there are many different names for the sections of strategic plans. The key is to agree what terms you will use and define them for everyone involved. Inputs Inputs are important because it is impossible to know where you are going until you know what is around you where you are now. Companies need to gather data from a variety of sources to get a clear look at the competitive environment and the opportunities and risks within that environment. You can think of it like a competitive intelligence program. Data should come from the following sources: Interviews with executives A review of documents about the competition or market that are publicly available Primary research by visiting or observing competitors Studies of your industry The values of key stakeholders This information often goes into writing an organizations vision and mission statements. Activities Activities are the meetings and other communications that need to happen during the strategic planning process to help everyone understand the competition that surrounds the organization. It is important both to understand the competitive environment and your companys response to it. This helps you spot where everyone looks at and responds to the data gathered from the inputs. Outputs The strategic planning process produces outputs. Outputs can be as basic as the strategic planning document itself. The documentation and communications that describe your organizations strategy, as well as financial statements and budgets, can also be outputs. Outcomes The implementation of the strategic plan produces outcomes (distinct from outputs). The outcomes determine the success or failure of the strategic plan by measuring how close they are to the goals and vision you outline in your plan. It is important to understand there will be planned and unintended outcomes, too. How you learn from and adapt to these changes influence the success of the strategic plan. During the planning process, decide how you will measure both the successes and failures of different parts of the strategic plan. After companies go through a lengthy strategic planning process, it is important that the plan does not sit and collect dust. Share, evaluate, and monitor the plan to assess how you are doing and make any necessary adjustments. [Some] leaders think that once they have their strategy, its up to someone else to execute it. Thats a mistake I see, Stockmal says. The process begins with distributing and communicating the plan. Decide who will get a copy of the plan and how those people will tell others about it. Will you have a meeting to kick off the implementation? How will you specify who will do what and when? Clearly communicate the roles people will have. Before you communicate the plan [to everyone], you need to have the commitment of stakeholders, Hofmeyer recommends. Have the stakeholders be a part of announcing the plan to everyone this keeps them accountable because workers will associate them with the strategy. That applies pressure to the stakeholders to actually do the work. Once the team begins implementation, its necessary to have benchmarks to help measure your successes against the plans objectives. Sometimes, having smaller action plans within the larger plan can help keep the work on track. During the planning process, you should have decided how you will measure success. Now, figure out how and when you will document progress. Keep an eye out for gaps between the vision and its implementation a big gap could be a sign that you are deviating from the plan. Tools are available to assist with tracking performance of strategic plans, including several types of software. For some organizations, a spreadsheet is enough, but you are going to manually enter the data, so someone needs to be responsible for that, Stockmal recommends. Remember: strategic plans are not written in stone. Some deviation will be necessary, and when it happens, its important to understand why it occurred and how the change might affect the companys vision and goals. Deviation from the plan does not mean failure, reminds Hofmeyer. Instead, understanding what transpired is key. Things happen, [and] you should always be on the lookout for that. Im a firm believer in continuous improvement, he says. Explain to stakeholders why a change is taking place. Theres always a sense of re-evaluation, but do it methodically. Build in a schedule to review and amend the plan as necessary; this can help keep companies on track. Strategic planning is part of strategic management, and it involves the activities that make the strategic plan a reality. Essentially, strategic management is getting from the starting point to the goal effectively and efficiently using the ongoing activities and processes that a company takes on in order to keep in time with its mission, vision, and strategic plan. [Strategic management] closes the gap between the plan and executing the strategy, Stockmal of ASP says. Strategic management is part of a larger planning process that includes budgeting, forecasting, capital allocation, and more. Deviation from the plan does not mean failure, reminds Hofmeyer. Instead, understanding what transpired is key. There is no right or wrong way to do strategic management, which makes your plan, its key to allow the strategic plan to evolve and grow as necessary, due to both the internal and external factors. We get caught up in all of the day-to-day issues, Stockmal explains, adding that people do not often leave room for implementing the plan and making progress. Thats what strategic management implores: doing things that are in the plan and not letting the plan sit on a shelf. Empower your people to go above and beyond with a flexible platform designed to match the needs of your team and adapt as those needs change. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time.Try Smartsheet for free, today. Try Smartsheet for Free Get a Free Smartsheet Demo The world witnessed history in the making on January 20, 2021, when President Joseph Robinette Biden, Jr, and Vice President Kamala D. Harris the first Asian-African American woman took their oaths of office. This event inspired many companies to embrace a forward-thinking mindset and keep up with modern times. You too can accomplish this by leveraging the power of the COVID-19. In the HR strategic plans have played a crucial role in sustaining employees. Thus, creating an engaging culture that keeps employees dialed in, especially the remote employees and a... By maximizing the results. Unfortunately, many HR professionals struggle to create and implement strategic management plans due to a lack of research or inadvertent errors while planning an already defined roadmap. Youll find a list of PowerPoint presentation templates below to help you implement, improve, and align your modern views. You can also establish priorities by avoiding errors and mistakes with the help of these templates. Lets start writing a presentation slide that meets your requirements! Template 1: HR Strategy Plans For Company Norms and Values Presentation Are you looking to create or improve your companys HR strategy plans? This template includes everything you need to get started, including building a culture, improving the employee journey, and more. Plus, learn how to embed those values into your work culture with this PPT design. Whether you're starting from scratch or just looking for a few new ideas to improve, this presentation has got you covered. Download this template Template 2: Employee Journey & Work Culture Presentation Are you looking to improve your employee journey and build a better company culture? This must-have template includes everything you need to get started. Building the best culture is key to retaining top talent and improving productivity. With our step-by-step guide, it's easier than ever to create an HR strategy that works for your business. Plus, find out how you can embed your company values into every aspect of the employee experience. So why wait? Start building a better workplace today! Download this template Template 3: HR Strategic Plans and Roadmap Presentation Streamline your human resource processes with this comprehensive roadmap template. 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This guide is perfect for businesses that want to have the right resources to support their growth. Download this template Template 8: Human Resources Planning Presentation Introducing the human resources planning presentation. This template is designed to help you create a strategic HR plan, develop an HRM plan, and assess your current HR capacity. With this PowerPoint deck, you'll be able to forecast your requirements and evaluate recruitment strategies. Plus, the checklist will keep you on track for effective resource management. Download the HR planning presentation today! Download this template Template 9: Strategic HR Management Presentation Do you need to prioritize your HR strategy but not know where to start? This comprehensive template will help you develop a strategic HR plan to make your business run smoothly. This guide has everything you need to get your HR department up and running, from forecasting employee needs to evaluating recruitment strategies. 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The HR strategic plan templates are quintessential in shaping employee behavior. So download and deploy them as per your needs! P.S: Check out this guide with bespoke corporate mentoring templates to boost retention, promotion rates, and employee satisfaction. Download the free HR Strategy Plans PDF. Clarification from the IRS is now developing for flexible in regarding the Executive Order signed by President Trump on August 8, 2020. The intent of the Presidents order was to provide financial relief on payroll taxes to employees due to the ongoing Covid-19 pandemic. Our team would like to provide the following details regarding the order and subsequent IRS guidance, which has serious ramifications to consider. Read More Following is a quick update regarding the executive orders signed by President Trump last Saturday, August 8 with the intent of providing financial relief on payroll taxes due the ongoing Covid-19 pandemic. Read More Writing a strategic plan can be daunting, as the process includes many steps. In this article, youll learn the basics of writing a strategic plan, what to include, common challenges, and more. Included on this page, you'll find details on what to include in a strategic plan, the importance of an executive summary, how to write a mission statement, how to write a vision statement, and more. The strategic planning process takes time, but the payoff is huge. If done correctly, your strategic plan will engage and align stakeholders around your companys priorities.Strategic planning, also called strategy development or analysis and assessment, requires attention to detail and should be performed by someone who can follow through on next steps and regular updates. Strategic plans are not static documents they change as new circumstances arise, both internally and externally.Before beginning the strategic planning process, it is important to make sure you have buy-in from management, a board of directors, or other leaders. Without it, the process cannot succeed.Next, gather your planning team. The group should include people from various departments at different levels, and the planning process is often the an open, free discussion within the group. Its important for leaders to get input from the group as a whole, but they dont necessarily need approval from everyone that will slow down the process.The plan author is responsible for writing and putting the final plan together and should work with a smaller group of writers to establish and standardize the tone and style of the final document or presentation.Sometimes, its a good idea to hire an external party to help facilitate the strategic planning process.Bryson says the facilitator can be in-house or external, but they need experience. You need to make sure someone is good, so there needs to be a vetting process, he says.One way to gauge a facilitators experience is by asking how they conduct conversations. Its important for facilitators to lead by asking questions, Bryson says.Bryson says that strong facilitators often ask the following questions:What is the situation we find ourselves in?What do we do?How do we do it?How do we link our purposes to our capabilities?The facilitators also need to be able to handle conflict and diffuse situations by separating idea generation from judgement. Conflict is part of strategic planning, Bryson admits. [Facilitators] need to hold the conversations open long enough to get enough ideas out there to be able to make wise choices.These outside helpers are sometimes more effective than internal facilitators since they are not emotionally invested in the outcome of the process. Thus, they can concentrate on the process and ask difficult questions. A strategic plan is a dynamic document or presentation that details your companys present situation, outlines your future plans, and shows you how the company can get there. You can take many approaches to the process and consider differing ideas about what should go into it, but some general concepts stand.Strategic planning is a prompt or a facilitator for fostering strategic thinking, acting, and learning, says Bryson. He explains that he often begins planning projects with three questions:What do you want to do?How are we going to do it?What would happen if you did what you want to do?The answers to these questions make up the meat of the planning document.A strategic plan is only effective when the writing and thinking is clear, since the intent is to help an organization keep to its mission through programs and capacity, while also building stakeholder engagement. The answer (or answers) to the first question where are we now? addresses the foundation of your organization, and it can serve as an outline for the following sections of your strategic plan:Mission statementCore values and guiding principlesIdentification of competing organizationsIndustry analysis (this can include a SWOT or PEST analysis) The answers to this question help you develop your goals for the future of your organization. These answers also assess whether your current trajectory is the future you want. These aspects of the plan outline a strategy for achieving success and can include the following:Vision statement about what the company will look like in the futureWhat is happening (both internally and externally) and what needs to changeThe factors necessary for success The answers to this question help you outline the many routes you can take to achieve your vision and match your strengths with opportunities in the market. A Gantt chart can help you map out and keep track of these initiatives.You should include the following sections:Specific and measurable goalsObjectivesAn execution plan that identifies who manages and monitors the planAn evaluation plan that shows how you plan to measure the successes and setbacks that come with implementation Strategic planning terminology is not standardized throughout the industry, and this can lead to confusion. Instead, strategic planning experts use many names for the different sections of a strategic plan. No matter what terms you use, the general idea is the same. Its like drawing a map for your company. One of the first steps is committing to a process, then determining how youre going to do it, McNerney explains.She uses a basic diagram that she calls the strategic plan architecture. The areas above the red dotted line are the implementation details. Below the red dotted line are the strategic plan include the following in roughly this order:Executive summaryElevator pitch or positioning statementMission statementCompany descriptionIndustry analysisMarketing planCapacityOperations planFinancial projectionEvaluation methodsSignature pageSome slides will contain all the above sections, but others will not show what you include depends on your organizations structure and culture.I want to keep it simple, so organizations can be successful in achieving [the strategic plan], McNerney explains. Your plan has to be aligned with your culture and your culture needs to be aligned with your plan if youre going to be successful in implementing it.The following checklist will help you keep track of what you have done and what you still need to do. Download Strategic Plan Sections Checklist Once youve assembled your team and defined your terms, its time to formalize your ideas by writing the strategic plan. The plan may be in the form of a document, a presentation, or another format.You can use many models and formats to guiding principlesIdentification of competing organizationsIndustry analysis this can include a SWOT or PEST analysis.The answers to this question help you develop your goals for the future of your organization. These answers also assess whether your current trajectory is the future you want. 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Mission statements are about the present, and vision statements are about the future. Mission statements provide items to act upon, and the vision statement offers goals to aspire to. For example, if a vision statement is Zero Hunger, as is that of the World Food Programme, the accompanying mission would be to provide food assistance to more than 80 million people each year. Vision Statement Focuses what your organization does todayFocuses on what your organization becomes tomorrowDrives the company forwardGives the company direction Change as business changesShould not change often since it is linked to companys foundationFor example, if your goal is to achieve success as a strategic planner, your objective would be to write all sections of the strategic plan in one month.iBossWell, Inc.s McNerney reiterates that strategic planning. Many people confuse goals and objectives, thinking the terms are interchangeable, but many argue that the two are distinct. You can think of them this way:Goals: Goals are broad statements about what you want to achieve as a company, and theyre usually qualitative. They function as your north star.Objectives: Objectives support goals, and theyre usually quantitative and measurable. They describe how you will measure the progress needed to arrive at the destination you outlined in the goal. More than one objective can support one goal.GoalsObjectivesBroad scopeNarrow scopeGeneral in direction, generic actionSpecific direction, specific actionAbstractSolidQualitative (not necessarily measurable)Quantitative (easily measured)Longer termShorter termFor example, if your goal is to achieve success as a strategic planner, your objective would be to write all sections of the strategic plan in one month.iBossWell, Inc.s McNerney reiterates that strategic planning. Many people confuse goals and objectives, thinking the terms are interchangeable, but many argue that the two are distinct. 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If not, you may need to hire personnel.The operations plan maps out your initiatives and shows you who is going to do what, when, and how. This helps transform your goals and objectives into a reality. A summary of it should go into your strategic plan. If you need assistance writing a comprehensive implementation plan for your organization, this article can guide you through the process.A marketing plan describes how you attract prospects and convert them into customers. You dont need to include the entire marketing plan in your strategic plan, but you might want to include a summary. For more information about writing marketing plans, this article can help.Then there are finances. We would all like to accomplish every goal, but sometimes we do not have enough money to do so. A financial plan can help you set your priorities. Check out these templates to help you get started with a financial plan. In order to know if you are reaching the goals you outline in your strategic plan, you need performance indicators. These indicators will show you what success looks like and ensure accountability. Sadly, strategic plans have a tendency to fail when nobody periodically assesses progress.Key performance indicators (KPIs) can show you how your business is progressing. KPIs can be both financial and nonfinancial measures that help you chart your progress and take corrective measures if actions are not unfolding as they should. Other terms similar to KPIs include performance measures and performance indicators.Performance indicators are not always financial, but they must be quantifiable. 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Dont lose what makes you good, he says. He adds that focusing on one KPI can hurt other areas of a companys performance, so reaching a goal can be short-sided.Some performance indicators can go into your strategic plan, but you might want to set other goals for your organization. A KPI dashboard can help you set up and track your performance and for more information about setting up a KPI dashboard, this article can help. While writing your strategic plan, you should think about how to share it. A plan is no good if it sits on a shelf and nobody reads it.Decide who should get a physical copy of the entire plan. This could include management, the board of directors, owners, and more. Do your best to keep it from your competitors. If you distribute it outside of your company, you might want to attach a confidentiality waiver.You can communicate your plan to stakeholders in the following ways:Hold a meeting to present the plan in person.Highlight the plan in a company newsletter.Include the plan in new employee onboarding.Post the plan on the employee intranet, along with key highlights and a way to track progress.If you hold a meeting, make sure you and other key planners are prepared to handle the feedback and discussion that will arise. You should be able to defend your plan and reinforce its key areas. The goal of the plans distribution is to make sure everyone understands their role in making the plan successful.Remind people of your companys mission, vision, and values to reinforce their importance. You can use posters or other visual methods to post around the office. The more that people feel they play an important part in the organizations success, they more successful you will be in reaching your goals of your strategic plan. As mentioned, strategic planning is a process and involves a team. As with any team activity, there will be challenges.Sometimes the consensus can take priority over what is clear. Peer pressure can be a strong force, especially if a boss or other manager is the one making suggestions and people feel pressured to conform. Some people might feel reluctant to give any input because they do not think it matters to the person who ultimately decides what goes into the plan.Team troubles can also occur when one or more members does not think the plan is important or does not buy into the process. Team leaders need to take care of these troubles before they get out of hand.Pay attention to your company culture and the readiness you have as a group, and adapt the planning process to fit accordingly. You need to find the balance between the process and the final product.The planning process takes time. Many organizations do not give themselves enough time to plan properly, and once you finish planning, writing the document or presentation also takes time, as does implementation. Dont plan so much that you ignore how you are going to put the plan into action. One symptom of this is not aligning the plan to fit the capacity or finances of the company.Stockmal explains that many organizations often focus too much on the future and reaching their goals that they forget what made them a strong company in the first place. Business architecture is important, which Stockmal says is building the capabilities the organization needs to fulfill its strategy. He adds that nothing happens if there is no budget workers to do the work necessary to drive change.Be careful with the information you gather. Do not take shortcuts in the research phase that will lead to bad information coming out further in the process. Also, do not ignore negative information you may learn. Overcoming adversity is one way for companies to grow.Be wary of cutting and pasting either from plans from past years or from other similar organizations. Every company is unique.And while this may sound obvious, do not ignore what your planning process tells you. Your research might show you should not go in a direction you might want to. The strategic planning process will differ based on your organization, but the basic concepts will stay the same. Whether you are a nonprofit, a school, or a for-profit entity, strategic plans will look at where you are and how you will get to where you want to go. For a nonprofit, the strategic plans purpose is mainly how to best advance the mission. Its imperative to make sure the mission statement accurately fits the organization.In addition to a SWOT analysis and other sections that go into any strategic plan, a nonprofit needs to keep an eye on changing factors, such as funding. Some funding sources have finite beginnings and endings. Strategic planning is often continuous for nonprofits.A nonprofit has to make the community care about its cause. In a for-profit organization, the marketing department works to promote the companys product or services to bring in new revenue. For a nonprofit, however, conveying that message needs to be part of the strategic plan.Coming up with an evaluation method and KPIs can sometimes be difficult for a nonprofit, since they are often focused on goals other than financial gain. For example, a substance abuse prevention coalition is trying to keep teens from starting to drink or use drugs, and proving the coalitions methods work is often difficult to quantify.This template can help you visually outline your strategic plan for your nonprofit. Download Nonprofit Strategic Plan TemplateExcel | Smartsheet Writing a strategic plan for a school can be difficult because of the variety of stakeholders involved, including students, teachers, other staff, and parents.Strategic planning in a school is different from others because there are no markets to explore, products to produce, clients to woo, or adjustable timelines. Schools often have set boundaries, missions, and budgets.Even with the differences, the same planning process and structure should be in place for schools as it is for other types of organizations.This template can help your university or school outline your strategic plan. Download University Strategic Plan Outline Word There is no set time period for a strategic plan, but five years can be a sweet spot. In some cases, yearly planning might keep you continually stuck in the planning process, while 10 years might be too far out.In addition to the basic sections that go into any strategic plan, when forecasting five years into the future, put one- and three-year checkpoints into the plan so you can track progress intermittently. While five years is often the strategic planning sweet spot, some organizations choose to create three-year plans. Looking too far ahead can be daunting, especially for a new or changing company.In a three-year plan, the goals and objectives have a shorter timeframe and you need to monitor them more frequently. Build those checkpoints into the plan.Most organizations do a three- to five-year plan now because they recognize the technology and the changes in business that are pretty dynamic now, Stockmal says. The first step in writing a strategic plan for your department is to pay attention to your companys overall strategic plan. You want to make sure the plans align.The steps in creating a plan for a department are the same as for an overall strategic plan, but the mission statement, vision, SWOT analysis, goals, objectives, and so on are specific to only the people in your department. Look at each person separately and consider their core competencies, strengths, capabilities, and weaknesses. Assign people who will be responsible for certain tasks and tactics necessary to achieve your goals.If you have access to a plan from a previous year, see how your department did in meeting its goals. Adjust the new plan accordingly.When you finish your departmental plan, make sure to submit it to whomever is responsible for your companys overall plan. Expect to make changes. A strategic plan is for the big picture, not for a particular project for an organization. Instead of a strategic plan, this area would fall under project management.If you have a failing project and need to turn it around, this article might help. Creating a strategic plan isnt only for businesses. You can also create a strategic plan to help guide both your professional and personal life. The key is to include what is important to you. This process takes time and reflection.Begin with looking at your life as it is now. Are you satisfied? What do you want to do more or less? What do you value most in your life? Go deeper than saying family, happiness, and health. This exercise will help you clarify your values.Once you know what is important to you, come up with a personal mission statement that reflects the values you cherish. As it does within a business, this statement will help guide you in making future decisions. If something does not fit within your personal mission, you shouldnt do it.Using the information you discovered during your SWOT and mission statement process, come up with goals that align with your values. The goals can be broad, but dont forget to include action items and timeframes to help you reach your goals.As for the evaluation portion, identify how you will keep yourself accountable and on track. You might involve a person to remind you about your plan, calendar reminders, small rewards when you achieve a goal, or another method that works for you.Below is additional advice for personal strategic plans:There are things you can control and things you cannot. Keep your focus on what you can act on.Look at the positive instead of what you will give up. For example, instead of focusing on losing weight, concentrate on being healthier.Do not overcommit, and do not ignore the little details that help you reach your goals.No matter what, do not dwell on setbacks and remember to celebrate successes. Empower your people to go above and beyond with a flexible platform designed to match the needs of your team and adapt as those needs change. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time.Try Smartsheet for free, today. Try Smartsheet for Free Get a Free Smartsheet Demo WORK WITH FLOWThe Smartsheet AI-powered platform transforms work management into a personalized, predictive engine helping you work the way you need, at the speed you need.Try Smartsheet for free Watch a demo Use cases to get you started Roche IT manages 30% more projects with the same number of project managers. Sutherland drives business efficiencies with process automation. DIRECTV tracks mission critical projects from inception to implementation. Uber cut marketing lifecycle development by almost half. McLaren Racing accelerates PMO efficiency and drives top-line growth. Convergint reduces the time for customer invoice collection by over 30 days. Sync your tools, keep teams connectedIntegrate your favorite apps with Smartsheet, keeping all your work in sync and your team in the loop.Learn more Teamwork makes the dream work, and with Smartsheet, its easier than ever. Collaborate in real-time, share updates, and keep everyone in the loop work together, wherever you are.Learn more We know how important your data is. Thats why weve got industry-leading security measures to keep it safe and sound, so you can focus on what you do best.Learn more AI that keeps your teams aheadSmartsheet AI-driven features, like intelligent formulas and data insights, help you move faster, scale smarter, and lead every project and portfolio with precision.Learn more Automate repetitive tasks and focus on what really matters. With workflow automation, you can simplify processes, reduce errors, and save time.Learn more Integrate your favorite apps with Smartsheet, keeping all your work in sync and your team in the loop.Learn more Teamwork makes the dream work, and with Smartsheet, its easier than ever. Collaborate in real-time, share updates, and keep everyone in the loopwork together, wherever you are.Learn more We know how important your data is. Thats why weve got industry-leading security measures to keep it safe and sound, so you can focus on what you do best.Learn more Smartsheet AI-driven features, like intelligent formulas and data insights, help you move faster, scale smarter, and lead every project and portfolio with precision.Learn more Automate repetitive tasks and focus on what really matters. With workflow automation, you can simplify processes, reduce errors, and save time.Learn more

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For example, tracking visitors to a website, customers completing a contact form, or the number of proposals that close with deals are all performance indicators that keep you on track toward achieving your goals.When writing your performance indicators, pay attention to the following:Define how often you need to report results.Every KPI must have some sort of measure.List a measure and a time period.Note the data source where you will get your information to measure and track.ASPs Stockmal has some questions for you to ask yourself about picking performance indicators.Are you in control of the performance measure?Does the performance measure support the strategic outcomes?Is it feasible?Is data available?Who is collecting that data, and how will they do it?Is the data timely?Is it cost-effective to collect that data?Is the goal quantifiable, and can you measure it over time?Are your targets realistic and time-bound?Stockmal also says performance indicators cannot focus on only one thing at the detriment of another. Dont lose what makes you good, he says. He adds that focusing on one KPI can hurt other areas of a companys performance, so reaching a goal can be short-sided.Some performance indicators can go into your strategic plan, but you might want to set other goals for your organization. A KPI dashboard can help you set up and track your performance and for more information about setting up a KPI dashboard, this article can help. While writing your strategic plan, you should think about how to share it. A plan is no good if it sits on a shelf and nobody reads it.Decide who should get a physical copy of the entire plan. This could include management, the board of directors, owners, and more. Do your best to keep it from your competitors. If you distribute it outside of your company, you might want to attach a confidentiality waiver.You can communicate your plan to stakeholders in the following ways:Hold a meeting to present the plan in person.Highlight the plan in a company newsletter.Include the plan in new employee onboarding.Post the plan on the employee intranet, along with key highlights and a way to track progress.If you hold a meeting, make sure you and other key planners are prepared to handle the feedback and discussion that will arise. You should be able to defend your plan and reinforce its key areas. The goal of the plans distribution is to make sure everyone understands their role in making the plan successful.Remind people of your companys mission, vision, and values to reinforce their importance. You can use posters or other visual methods to post around the office. The more that people feel they play an important part in the organizations success, they more successful you will be in reaching your goals of your strategic plan. As mentioned, strategic planning is a process and involves a team. As with any team activity, there will be challenges.Sometimes the consensus can take priority over what is clear. Peer pressure can be a strong force, especially if a boss or other manager is the one making suggestions and people feel pressured to conform. Some people might feel reluctant to give any input because they do not think it matters to the person who ultimately decides what goes into the plan.Team troubles can also occur when one or more members does not think the plan is important or does not buy into the process. Team leaders need to take care of these troubles before they get out of hand.Pay attention to your company culture and the readiness you have as a group, and adapt the planning process to fit accordingly. You need to find the balance between the process and the final product.The planning process takes time. Many organizations do not give themselves enough time to plan properly, and once you finish planning, writing the document or presentation also takes time, as does implementation. Dont plan so much that you ignore how you are going to put the plan into action. One symptom of this is not aligning the plan to fit the capacity or finances of the company.Stockmal explains that many organizations often focus too much on the future and reaching their goals that they forget what made them a strong company in the first place. Business architecture is important, which Stockmal says is building the capabilities the organization needs to fulfill its strategy. He adds that nothing happens if there is no budget workers to do the work necessary to drive change.Be careful with the information you gather. Do not take shortcuts in the research phase that will lead to bad information coming out further in the process. Also, do not ignore negative information you may learn. Overcoming adversity is one way for companies to grow.Be wary of cutting and pasting either from plans from past years or from other similar organizations. Every company is unique.And while this may sound obvious, do not ignore what your planning process tells you. Your research might show you should not go in a direction you might want to. The strategic planning process will differ based on your organization, but the basic concepts will stay the same. Whether you are a nonprofit, a school, or a for-profit entity, strategic plans will look at where you are and how you will get to where you want to go. For a nonprofit, the strategic plans purpose is mainly how to best advance the mission. Its imperative to make sure the mission statement accurately fits the organization.In addition to a SWOT analysis and other sections that go into any strategic plan, a nonprofit needs to keep an eye on changing factors, such as funding. Some funding sources have finite beginnings and endings. Strategic planning is often continuous for nonprofits.A nonprofit has to make the community care about its cause. In a for-profit organization, the marketing department works to promote the companys product or services to bring in new revenue. For a nonprofit, however, conveying that message needs to be part of the strategic plan.Coming up with an evaluation method and KPIs can sometimes be difficult for a nonprofit, since they are often focused on goals other than financial gain. For example, a substance abuse prevention coalition is trying to keep teens from starting to drink or use drugs, and proving the coalitions methods work is often difficult to quantify.This template can help you visually outline your strategic plan for your nonprofit. Download Nonprofit Strategic Plan TemplateExcel | Smartsheet Writing a strategic plan for a school can be difficult because of the variety of stakeholders involved, including students, teachers, other staff, and parents.Strategic planning in a school is different from others because there are no markets to explore, products to produce, clients to woo, or adjustable timelines. Schools often have set boundaries, missions, and budgets.Even with the differences, the same planning process and structure should be in place for schools as it is for other types of organizations.This template can help your university or school outline your strategic plan. Download University Strategic Plan Outline Word There is no set time period for a strategic plan, but five years can be a sweet spot. In some cases, yearly planning might keep you continually stuck in the planning process, while 10 years might be too far out.In addition to the basic sections that go into any strategic plan, when forecasting five years into the future, put one- and three-year checkpoints into the plan so you can track progress intermittently. While five years is often the strategic planning sweet spot, some organizations choose to create three-year plans. Looking too far ahead can be daunting, especially for a new or changing company.In a three-year plan, the goals and objectives have a shorter timeframe and you need to monitor them more frequently. Build those checkpoints into the plan.Most organizations do a three- to five-year plan now because they recognize the technology and the changes in business that are pretty dynamic now, Stockmal says. The first step in writing a strategic plan for your department is to pay attention to your companys overall strategic plan. You want to make sure the plans align.The steps in creating a plan for a department are the same as for an overall strategic plan, but the mission statement, vision, SWOT analysis, goals, objectives, and so on are specific to only the people in your department. Look at each person separately and consider their core competencies, strengths, capabilities, and weaknesses. Assign people who will be responsible for certain tasks and tactics necessary to achieve your goals.If you have access to a plan from a previous year, see how your department did in meeting its goals. Adjust the new plan accordingly.When you finish your departmental plan, make sure to submit it to whomever is responsible for your companys overall plan. Expect to make changes. A strategic plan is for the big picture, not for a particular project for an organization. Instead of a strategic plan, this area would fall under project management.If you have a failing project and need to turn it around, this article might help. Creating a strategic plan isnt only for businesses. You can also create a strategic plan to help guide both your professional and personal life. The key is to include what is important to you. This process takes time and reflection.Begin with looking at your life as it is now. Are you satisfied? What do you want to do more or less? What do you value most in your life? Go deeper than saying family, happiness, and health. This exercise will help you clarify your values.Once you know what is important to you, come up with a personal mission statement that reflects the values you cherish. As it does within a business, this statement will help guide you in making future decisions. If something does not fit within your personal mission, you shouldnt do it.Using the information you discovered during your SWOT and mission statement process, come up with goals that align with your values. The goals can be broad, but dont forget to include action items and timeframes to help you reach your goals.As for the evaluation portion, identify how you will keep yourself accountable and on track. You might involve a person to remind you about your plan, calendar reminders, small rewards when you achieve a goal, or another method that works for you.Below is additional advice for personal strategic plans:There are things you can control and things you cannot. Keep your focus on what you can act on.Look at the positive instead of what you will give up. For example, instead of focusing on losing weight, concentrate on being healthier.Do not overcommit, and do not ignore the little details that help you reach your goals.No matter what, do not dwell on setbacks and remember to celebrate successes. Empower your people to go above and beyond with a flexible platform designed to match the needs of your team and adapt as those needs change. The Smartsheet platform makes it easy to plan, capture, manage, and report on work from anywhere, helping your team be more effective and get more done. Report on key metrics and get real-time visibility into work as it happens with roll-up reports, dashboards, and automated workflows built to keep your team connected and informed. When teams have clarity into the work getting done, theres no telling how much more they can accomplish in the same amount of time.Try Smartsheet for free, today. Try Smartsheet for Free Get a Free Smartsheet Demo WORK WITH FLOWThe Smartsheet AI-driven features, like intelligent formulas and data insights, help you move faster, scale smarter, and lead every project and portfolio with precision.Learn more Automate repetitive tasks and focus on what really matters. With workflow automation, you can simplify processes, reduce errors, and save time.Learn more