

# Strategic Planning Roadmap

## Preliminary Meeting

- Preliminary meeting with client
- Introduce facilitators
- Set schedule and decide dates
- Decide roles
- Define process
- Create customized development plan for client
- Introductory presentation

## Environmental Scan

- Survey external stakeholders
- Interview members
- Interview executives
- Interview/survey staff
- Compile and format data
- Analyze data
- Review findings with client

## Strategic Planning Session

- Create facilitation plan
- Conduct planning session
- Review mission, vision, values, and goals
- Review environmental scan results
- Establish objectives

## Strategic Plan

- Draft Strategic Plan
- Review and finalize plan with client
- Client approves and adopts plan
- Client publishes plan and posts to website

## Action Planning

- Prioritize objectives
- Establish timeframes
- Determine performance metrics
- Assign responsibilities
- Draft action plan
- Review and finalize plan with client

## Optional Services

### Re-create or Update:

**Mission  
Vision  
Values  
Goals**

- Conduct workshops
- Survey participants
- Review new mission, vision, values, and goals with client for approval