

Strategic Planning — *Critical Questions at the Start*

At the onset of strategic planning, be sure to consider five essential questions before drafting goals. The resulting discussions will be beneficial for leadership understanding and buy-in.

Considerations

- 1. Does it fit inside our mission?**

All activities and efforts should fit inside the mission statement to respect the founders and protect the organization's tax status. Is the mission statement distinct and contemporary? Be careful: treat it like the Constitution, opening it only rarely and wisely to refresh it. Many organizations add vision and value statements to clarify purpose.
- 2. Who is the primary customer?**

Often the association's secondary and tertiary members exhaust the resources from the primary members for whom the organization was created. Be sure the primary members are on the minds of leadership. Don't let new market segments, an abundance of supplier members, *etc.* distract.
- 3. What is the economic impact?**

The question is a *reality check* that should be asked often by the treasurer, or finance committee. There are plenty of worthy projects an organization can undertake, but resources are limited in the form of 1) staff, 2) committees, 3) volunteers and 4) funds. A plan without resources is simply an illusion.
- 4. Do we know our audiences?**

The strategic plan "positions" the organization. It is an indication to others about the strengths, or weakness of the association. How will 1) members, 2) prospects, 3) government, 4) consumers, 5) allied organizations, and the 6) media perceive your plan?
- 5. Does the organization have real value?**

Some organizations live in the '60s by offering benefits described as a newsletter, social meetings, and rental car discounts. They don't *add value* to the information they process. Ask the questions: Are we meeting the critical needs of members? Do we *add value* to what passes through our organization? Do members receive a return on investment (ROI)? Can benefits be honed and others dropped? What's our golden handcuff benefit?¹

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¹ Golden Handcuff Benefit – A benefit so valuable that no member would drop out of the organization.