

# Strategic Planning

## A SMART STRATEGY ENSURES GREATER SOCIAL CHANGE

To achieve your social change mission you must clearly articulate what you are trying to accomplish and how you will marshal people and money to get there.

In fact, charting a future direction is a fundamental first step in your organization's journey to achieving your mission in a sustainable way. The very process of creating a smart strategy for the future builds the momentum and resources needed to get there.

### A SMART STRATEGIC PLANNING PROCESS:

- Starts from an in-depth understanding of the outside world (clients, grantees, funders, partners, influencers, policymakers, competitors)
- Articulates how your organization creates social value
- Sets forth a bold vision with a specific road map, inspiring confidence & investment
- Puts everything on the table and allows no sacred cows
- Aligns programs and activities with your financial mode
- Includes a tactical plan so that your broad goals can be achieved

A compelling, thoughtful and actionable strategic plan energizes your board, staff, partners, and funders. It leads you to raise more money, expand your networks, broaden your reach. But mostly importantly, it ensures you achieve more of the social change you seek.

## A smart strategy completely transforms your work. It will:

### CREATE MOMENTUM

To really tap into the potential of your board, staff, volunteers, funders, and partners you must inspire them to larger heights and help them understand their role in reaching those heights. A great strategic plan does that.

### ATTRACT DEEPER FUNDING

People and organizations that invest in social change are in effect investing in the future of the organizations creating that change. In articulating your future plans in a thoughtful, compelling way, you encourage funders to make a much larger investment in your work.

### BECOME A MANAGEMENT TOOL

An effective strategic plan doesn't sit on the shelf, but rather is a living, breathing guide to the daily work and decisions of your organization. It's not a final product, it's a way of life.

### FILTER FUTURE DECISIONS

A savvy strategic plan doesn't tie your organization's hands, rather it becomes a lens through which you can thoughtfully analyze future decisions and make the best moves.

### ACHIEVE MORE RESULTS

A smart strategic planning process forces you to do the analysis, conduct the research, make the hard decisions, and track your progress so that at the end of the day you actually are making a difference.



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# The Strategic Planning Process

Nell leads you through the 9 steps of the strategic planning process, which takes about 6 months:

## 1 CREATE A TEAM

With guidance from Nell, you will create an 8-12 member strategic planning group of board, staff & external stakeholders. This group meets 3 times over the course of the process to ask hard questions, review market research, and make recommendations for the board to review and approve. Nell leads all of these meetings.

## 2 LOOK INSIDE

Nell leads the strategic planning group to analyze your target populations, the outcomes you want to achieve, the value your organization creates, your core competencies, the financial & social impact of your work, and more.

## 3 LOOK OUTSIDE

Nell then guides the strategic planning group to analyze external trends, your competitors & collaborators, your partners & funders, and your clients or grantees to understand the implications for your future strategy. Nell leads your staff to conduct market research that will inform these conversations.

## 4 REFINE VISION AND MISSION

Given these internal and external analyses, Nell helps you revisit your vision and mission. The vision is the social change your organization seeks, and the mission is the day-to-day activities driving toward that vision.

## 5 DEVELOP GOALS AND OBJECTIVES

Nell then leads you to determine what you want to accomplish in the next 3+ years. She helps you create 3-5 broad, measurable, achievable goals in the specific time frame of your plan, and then break each goal into the objectives to get there.

## 6 CREATE A FINANCIAL MODEL

Nell works with you to tie those goals and objectives to the revenue, expenses and capital necessary to make them happen. She leads you to create a multi-year budget projection necessary to realize your strategic plan goals.

## 7 SEEK & INTEGRATE FEEDBACK

At every step in the process, Nell helps you seek and integrate feedback from your entire staff and board, and other external players. Nell also leads a full board retreat to review and revise the resulting draft strategic plan. Once the board is happy with the final strategic plan, they vote to approve it.

## 8 OPERATIONALIZE

Once the strategic plan is approved by the board, Nell leads you to operationalize it so that it doesn't just sit on a shelf. For each objective, Nell helps you create milestones, activities, deliverables, people responsible and due dates.

## 9 MONITOR

Nell leads you to develop a process to regularly monitor and measure the achievement of your strategic plan. Staff and board meetings are focused on the plan so that it begins to drive daily activity at your organization and becomes a new way of life.

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### About Nell

Nell Edgington, President of Social Velocity, helps nonprofit and philanthropic leaders become more strategic, financially savvy and confident at creating social change. You can read my [client case studies](#) or learn about the [consulting services](#) I offer.



### Want to Learn More?

If you are ready to talk about how I could help your organization do and be more, [Apply for a Free Consultation.](#)

