

Planning Strategy & Success

Practice Guide



Planning is often considered to be one of the most important skills you can learn and use at work. Your personal and organisational success can depend on your planning skills and the strategies that you use to execute your plans.

This practice guide is designed to give you a basic outline of two vital planning tools for you to understand, develop and implement.

The Business Plan

Successful organisations take the time to develop a well thought out business plan. A business plan is a document telling the story of your organisation, what it does, why and how. It describes your vision, mission and values. The plan includes your past accomplishments and your future goals, clearly communicating the strategies you are going to implement to achieve your goals. It also provides information about your clients/customers and what benefits and services you offer them. The plan describes the different strengths and attributes of your organisation.

The business plan is where you describe your “point of difference”. This means how and why your organisation stands out from other organisations and what makes it unique. The plan also typically includes your marketing strategies, financial plans and how your organisation is going to be sustainable.

The size of your business plan depends on the organisation and how long it has been operating. It does not need to be a large document but you should try to be thorough, and make sure it is visually appealing and easy to read. Aim to excite your reader and motivate them to get involved. The business plan is your chance to ‘sell’ your ideas and vision, to promote your values and brand.

Business plans are often enhanced by including your governance model, organisational structure and the names and qualifications of your Board of Management or key management positions. It is also wise to name your key external stakeholders, existing funders and anyone else that you work collaboratively with. This information gives you credibility and promotes your strengths and reputation.

A business plan should present your realistic game plan for achieving success. It should be written strategically, using credible and compelling statistics and stories. When completed, the business plan should be able to promote the organisation’s capacity and should be viewed as a key communication tool to potential funders, donors and supporters.

Does your business plan clearly state why your organisation is uniquely qualified to succeed?



The Strategic Plan

Most thriving organisations have simple and clear goals that people know and believe in. A strategic plan helps the organisation write those goals down, and put a strategy in place to achieve them.

A strategic plan is forward thinking and written to provide the organisation with a map towards the desired future. A strategic plan broadly describes what key goals the organisation has over the next few years.

- What needs to be done
- How it is going to be achieved
- By whom
- By when

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This plan requires strategic foresight to take into consideration the changing internal and external circumstances your organisation is likely to encounter.

Like business plans, strategic plans do not have to be complex and large. When developing the plan, keep in mind who you are writing the plan for, and develop a format that will make sense to them. If possible involve your stakeholders, the people who are going to use and follow the plan, and ask them to participate in the planning process.

It is often hard to decide what to include in your strategic plan, but do not be tempted to write too many goals. It will make the planning process very frustrating and you may never finish the plan at all if it takes too much time to complete.

To successfully engage and motivate people to develop, implement and monitor a strategic plan, you need to ensure that four key questions are considered:

- 1 Are the right people participating in the planning process and given the opportunity to have a voice and share their ideas?

- 2 Does the planning process collect and consider a wide range of information, both qualitative and quantitative, to determine what goals are of strategic significance to the organisation and should be included in the plan?
- 3 Is the board and management committed to driving the process, implementing and reviewing it?
- 4 Once the plan is developed, are there adequate resources and sufficient time provided to implement the strategy so it can become the platform for success?

If you have spent time and resources on developing a business or strategic plan you are proud of, make sure that you have a communication strategy in place so that people read the plans, are inspired and motivated by them. Do not let them gather dust, use them throughout the year to guide your workforce and strengthen your organisation.

A good plan today is better than a perfect plan tomorrow
Proverb

The business plan promotes the credibility and viability of the organisation by explaining how the organisation operates and its funding projections. This communication and marketing tool should enable the organisation to grow and prosper.

The strategic plan states an organisation's mission, and key operational and financial goals and strategies. It is a guide for the organisation's workforce and supports management to monitor performance.

