**5 Steps to Strategic Planning: The Pathway to Success**

**Step 1:** Assess where you are and get buy-in.
- Get your leaders and managers together for a management briefing to discuss:
  - Where are we today?
  - Where do we want to be?
  - How do we begin our planning process?

**Step 2:** Set your team’s direction.
- Gather your team for a strategic direction setting workshop to define:
  - Your current situation
  - Your mission statement
  - Your goals
  - SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) objectives

**Step 3:** Set your team’s implementation plan.
- Gather your leaders, managers, and/or key stakeholders to identify:
  - Barriers (existing or potential challenges that hinder the achievement of one or more objectives) and critical success factors (key conditions that must be created to achieve the vision)
  - Key strategies to overcome the barriers
  - Key strategies to create the critical success factors
  - Prioritization and alignment of the strategies
  - Your monitoring plan to ensure accountability

**Step 4:** Execute your plan and monitor.
- Implement your plan, adjust where needed along the way, and keep everyone accountable through regular check-ins:
  - Monthly check-ins
  - Quarterly reviews
  - Annual updates

**Step 5:** Realize success!
- Measure your results against your SMART objectives. Identify areas of improvement. Recognize your team’s success to build unity and continued engagement and motivation!

*Adapted from the Drivers Model by Leadership Strategies

**No shortcuts!**
Each step plays an important part to successful planning.

Most leaders view strategic planning as a complex activity. These 5 steps – adapted from the Drivers Model – simplify the work. The Drivers Model is Leadership Strategies’ proven methodology designed to help your organization identify its business problems and construct an effective strategy for solving them. Simple, yet robust and comprehensive enough, the Drivers Model is scalable to fit your organization’s needs – large or small.

**Contact Us**
Learn additional ways to simplify and strengthen your strategic planning efforts.

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