

- Strategic Advisory
- Culture and Organizational Development
- Brand Positioning



# STRATEGIC PLANNING



## Building Tomorrow Today: How to Create Strategies That Work

Why is strategic planning important? Think of trying to drive across the country without a map or GPS – it is hard to find the right direction! In this document, we will summarize our philosophy on strategic planning and tips and tricks for you to help your organization build strategies that work.

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# Our Philosophy

We see a strategic plan as an organization's roadmap to success. A strong strategic plan often includes high-level elements like Purpose and Values that are foundational and embedded in the DNA of the company as well as more detailed elements like Strategic Directions and Priorities that clearly outline what the organization is striving to achieve during the course of the strategic plan.



**Purpose** – Why an organization exists and does the work that they do.



**Values** – How an organization carries out its work; embodied in the ways team members act and interact.



**Strategic Directions** – Succinct, action-oriented statements highlighting how an organization will advance their strategy.



**Priorities** – How an organization will achieve progress within each Strategic Direction.

You may have noticed that we don't mention Vision and Mission at all – that was deliberate! At our firm, we believe that Purpose can replace Vision and Mission as an option that is punchier, more memorable, and more impactful for stakeholders.

All of our work at MacPhie is grounded in what we call Magnetism, which creates an inclusive, energizing, and productive environment conducive to idea-sharing and collaboration. We believe organizations and brands – like magnets – attract or repel the people who matter most to them. Our key questions help identify and increase your positive magnetic force. For us, the process is just as important as the product. We embrace co-creation, helping our clients get to their best result. That's the MacPhie way.

# Our Process

Our firm has led hundreds of facilitations for an extensive list of clients – from healthcare organizations to post-secondary institutions to member associations to government ministries to private sector institutions. We have a four-phased strategic planning process that inspires success:

## Phase 1: Plan Phase

The first phase in the process is dedicated to planning, laying the foundation for success. This involves having several planning meetings with key decision makers to agree on objectives, milestones, timelines and more. As part of this phase, we also help create a Steering Committee composed of staff at different levels of the organization and potentially some Board members to help guide the process.

## Phase 2: Learn Phase

Our next phase is all about research in order to develop a deeper understanding of our partner's context. For us, the process is just as important as the end product and having comprehensive stakeholder engagement will help build excitement and buy-in to the strategic plan, making future implementation a lot easier. Through surveys, interviews and focus groups, we try to engage as many of your stakeholders as possible. We also typically conduct an environmental scan as part of this phase.



## Phase 3: **Analyze Phase**

This phase involves a bottom-up and top-down approach to insight development, transforming learning and insights into tangible future directions. In this phase, our analysis is synthesized into a comprehensive research report, summarizing key conclusions from the Learn Phase and identifying emerging strategic considerations. This report serves as the foundation for decision making in the next phase.

## Phase 4: **Decide Phase**

The final phase of our strategic planning process involves facilitating sessions with the Steering Committee, Senior Leadership Team and Board to use the insights in the Analyze Phase Report to develop strategic plan elements that represent the voices of stakeholders, are authentic to the organization, and are aspirational but not unrealistic. In this phase we leverage what we call 'Activist Facilitation', wherein we seek to get to the best answer for the group – not consensus. Activist Facilitation also means we don't shy away from sharing our own perspectives to help drive innovative decision-making.

## Tips for Leaders

Here are four key tips for leaders looking to embark on a successful strategic planning process:

- ✔ **Incorporate diversity, equity and inclusion in your process.** From having inclusive and culturally sensitive moderator's guides, to implementing diverse stakeholder engagement, to writing the strategic plan with inclusive language, it is critical that stakeholders see themselves reflected in both the process and product.

- ✔ **Create comfortable and authentic spaces.** The success of the entire strategic plan rests on the ability for stakeholders and team members to authentically and honestly share their opinions. Especially in the Learn and Decide Phases, it is important to create safe spaces where people feel comfortable sharing their thoughts, collaborating, and being their authentic selves. Without this, you may end up with a strategic plan that doesn't resonate and 'sits on the shelf' as a result of low buy-in.
- ✔ **Set clear, measurable and focused goals.** It can become very easy to include too much in the strategic plan. One of the most difficult, yet important, parts of the process is prioritization. If we include too many goals in the plan, it can be demotivating for team members, creating unrealistic expectations. Furthermore, goals should be tangible, measurable and clear for all team members across the organization.
- ✔ **Communicate, communicate, communicate, and then communicate some more.** Regularly communicate progress and updates to all stakeholders. Transparent communication keeps everyone informed, engaged, and motivated throughout the process and beyond

## Final Thoughts

While we are sector agnostic at MacPhie, one thing that is common across our partners is just how fast their landscapes are evolving. Strategic plans are more important than ever before in order to chart success during rapidly changing and unpredictable times. A strategic plan can be that factor that ties an organization together, creating a unified vision towards the future.



# Thank you for thinking with us.

Want to learn more about strategic planning at MacPhie, check out our [website](#) or send us an [email](#)!

