



STRATEGIC PLANNING

FOR BUSINESS AND GOVERNMENT

BACKGROUND

Strategic planning is concerned with achieving big goals relative to the organisation. They will take some time, say 3-5 years. If the goals were smaller, they would become objectives, delivered as projects or initiatives. Where the organisation seeks to be is the Vision, strategic goals must help the organisation to realise that Vision.

To achieve such goals the organisation will have to change in some ways. This change is the essence of strategic planning. The goals exist within an environment comprising people, places or ecosystems. Therefore it is necessary to have a clear understanding of this environment.

To be able to achieve long-term aspirational goals an organisation is likely to have to make at least some changes to its internal expertise, capacity, culture and assets. It is necessary to define the gap between the organisations current and desired future states and to develop steps to bridge that gap. This must align with the organisation's Mission.

The way in which the organisation goes about achieving its goals is guided by the guardrails established by its Values. These define what the organisation is and is not willing to do in the pursuit of its goals.

THE OPTIAS PROCESS

This presentation identifies the four stages used by Optias in guiding the development of strategic plans:

- The Situation Analysis – the organisation's external environment and the gaps between the organisation's current and desired future states.
- The Vision, Mission and Values to guide where the organisation wants to go, how it might get there, and what are acceptable actions it might take to do so.
- The plan to take the organisation from its current to its future state and how it will deliver the long-term goals.
- Ensuring widespread adoption of the plan within the organisation to make sure all members of the organisation are heading in the same direction.



THE SITUATION ANALYSIS

Defining the internal and external environments of the organisation



THE EXTERNAL ENVIRONMENT

The organisation is designed to meet the requirements of people, places or ecosystems within the external environment. These requirements might be needs, wants or expectations.

A Situation Analysis investigates that external environment to determine the extent to which those requirements should or can be satisfied, and the extent to which they are.

The level of satisfaction can be described in terms of nature, quantity or quality.



DEFINING THE EXTERNAL ENVIRONMENT

Optias uses a range of tools to define the requirements of people, places and ecosystems and their expectations in relation to the organisation's operations.



Workshops



Desktop research



Sentiment analysis



External stakeholder interviews



Surveys

SCENARIO MODELLING

To determine its future goals organisations must consider the future external environment. This is fraught with uncertainty, as evidenced by the emergence of the SARS-CoV-2 virus causing the current pandemic.

In formulating responses to different future scenarios Optias uses real options. Real options provides a sound basis for managing uncertainty.



THE INTERNAL ENVIRONMENT

Internal stakeholder interviews and data analysis are used to define the organisation's expertise, capacity, culture and assets and what they would need to be to deliver the organisation's goals.

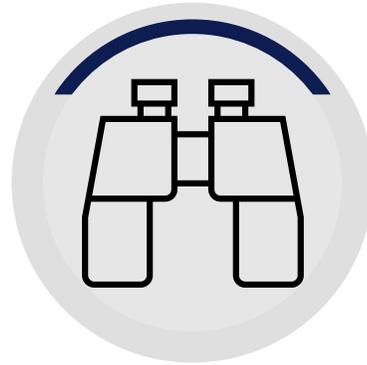
The analyses of the external and internal environments are combined to generate the Situation Analysis.

This Situation Analysis is provided to all participants in the next phase of the Strategic Planning process which comprises a series of workshops.



VISION, MISSION AND VALUES

Prior to undertaking the workshops to develop the strategic plan, it is essential that the Vision, Mission and Values of the organisation be confirmed or formulated. This can be done in a workshop environment. The Vision is required to highlight the future state of the organisation, the Mission describes in broad terms how to get there, and the Values provide the guardrails that can define what the organisation is and is not prepared to do to realise the vision.



VISION

A good vision statement is a short, unambiguous statement outlining what the organization would like to ultimately achieve. A vision statement gives purpose to its existence of the organization.



MISSION

A good mission statement is also short and unambiguous. It describes the ultimate goals that the organisation must realise to achieve the vision.



VALUES

The values of an organisation clearly state how the organisation will operate in pursuing its mission. Importantly. A value statement shows what an organisation prioritises and deems important.

STRATEGIC LOGIC MAP

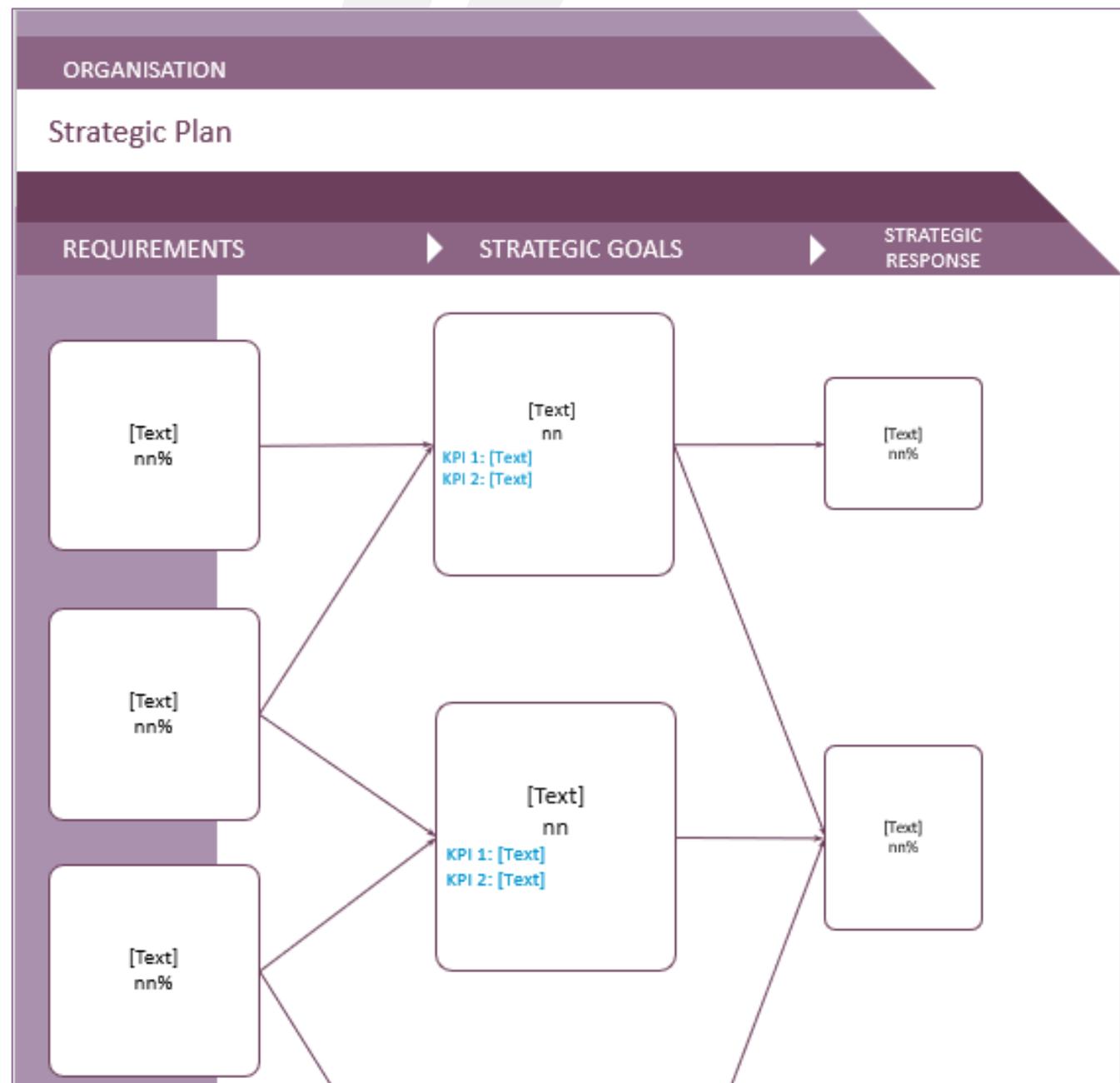
The strategic logic is defined in a one–page map developed through a workshop process. This map has three columns, REQUIREMENTS, STRATEGIC GOALS AND STRATEGIC RESPONSE.

Requirements

Using the situation analysis, the vision, mission and values, a facilitator works with a team from the organisation to develop the strategic logic map. The first part of that process is to formulate short, tight statements that describe the requirements that must be addressed in the strategic plan.

Goals and Response

The strategic goals are then formulated as what will be realised through addressing the requirements. The strategic response describes how the requirements will be addressed and the strategic goals realised.



UNDERTAKE A SWOT ANALYSIS

When the strategic responses have been formulated, it will be necessary to turn those into specific actions. Those actions must be influenced by the strengths and weaknesses of the organisation, and the threats and opportunities that exist in the environment. A workshop is undertaken to develop a SWOT analysis.

Strengths

Weaknesses

Opportunities

Threats

DETERMINE ACTIONS

For each strategic response, a series of different actions are formulated to develop the action plan component of the strategic plan. These actions must be formulated in a manner that addresses any items arising from the SWOT analysis. This is represented in the table below.

Strategic Response	Strength	Weakness	Opportunity	Threat	Action
Strategic Response 1	Impact	Impact	Impact	Impact	Action 1 accounting for the SWOT

REVIEW AND COMMITMENT



STAKEHOLDER ENGAGEMENT

With a draft strategic plan, stakeholders within the organisation are now engaged for two purposes:

- To review and comment on the plan. This must be iterative. If comments are provided on the first round of engagements, a second round is undertaken with the responses to those comments.
- To ensure the entire organisation is committed to the strategic plan.





FOLLOW UP



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