



Strategic Planning

How to Create a Winning Plan in 5 Steps

#1. Achievability

Is it realistic?

TIME



RESOURCES



PEOPLE



#2. Planning

Which of these do you think is most important?

- Plan all steps in advance
- Use genuine strategic thinking
- Have a detailed set of action steps
- Identify time frames & deadlines in advance
- Know your financial limitations and stay on budget
- Set milestones to track your progress
- Get Leadership and User buy-in
- Hold stakeholders accountable



Constantly be thinking about the “us” in your plan.





Planning in 7 Steps

#1. Create a Project Scope

- Make a complete list of tasks, resources, deliverables, and anything else that needs to happen to complete your project.
- Consider anything outside your scope to be off-limits.
- Establish clearly defined boundaries.



Planning in 7 Steps

#2. Define Your Goals

- Identify the goals you expect to achieve.
- List every positive benefit that your project will realize and how it will help others inside your organization.
- Include how your goals align with your company's vision and mission.





Planning in 7 Steps

#3. Uncover Potential Risks

- Identify what can or might go wrong during implementation.
- Talk to others who've successfully navigated a project implementation.
- Use the time you allocated for setbacks if necessary.



Planning in 7 Steps

#4. List Your Assumptions

- Identify and value your assumptions.
- Interview stakeholders and key members of your implementation team.
- Bring in someone outside your project to identify assumptions you may have missed.

Planning in 7 Steps

#5. Define Key Stakeholders



- Make sure you have representation in every key area.
- Define the project sponsor and owners of specific tasks and explain what each person is responsible for.
- List everyone who will serve as points of contact and their contact information.

Planning in 7 Steps

#6. Allocate Your Resources



- Identify your current resources.
- Identify the resources you need to acquire.
- Identify how you will acquire the additional resources you need.

Planning in 7 Steps

#7. Create an Implementation Rollout Schedule

- Create a rollout schedule with specific timelines.
- Keep track of your progress.
- Develop milestones for each phase of your project.

#3. Implementation

Go Live with the Change

- Are you Ready?
- Are you Sure?
- Are you Confident?
- Go for it!





Monitor the Implementation

- Establish a process for monitoring your implementation throughout the execution phase.
- Continue monitoring your implementation after your launch.



Create a User Adoption Strategy

- Set aside time to create a digital adoption strategy.
- Educate users on the new changes.

Gather Feedback



Feedback

- Collect feedback from stakeholders and anyone involved or impacted by the implementation.
- Use this feedback to make your next implementation project run more smoothly.

MEASURE
SUCCESS



#4. Measurement

- Gather stakeholder feedback
- Review project specifications
- Ensure budget compliance
- Meet schedule requirements
- Review team satisfaction
- Determine quality measurements



#5. Accountability

Put an accountability system in place

Create rewards for those who help you meet your goals

Broadcast the outcome(s) of your project



In Summary.....

The following guidelines will help ensure that your plan is a success.



- Be sure the plan is realistic.
- Include all implementation stakeholders in the planning and LISTEN to their feedback.
- Include every action & timetable required.
- Distribute the plan to team members and ensure they understand their tasks and the follow-up schedule.
- Launch the plan.
- Measure your success.
- Hold yourself and team members accountable.



Great

Give Yourself at Hand!

Job!

Strategy → Execution → Success

