

## Strategic Planning Checklist

### Free Resource from Mission-Driven Momentum Podcast

Use this checklist to build or refresh your strategic plan with clarity and confidence. Work through it with your team, board, or leadership circle.

## PHASE 1: ASSESS YOUR FOUNDATION

### Mission & Vision Audit

- ☐ Our mission statement clearly states **why** we exist
- ☐ Our mission is **specific enough** to guide decision-making
- ☐ Team members can **recite or paraphrase** our mission from memory
- ☐ Our vision statement describes a **bold, inspiring future, while still being measurable**
- ☐ Our vision is **realistic yet aspirational**
- ☐ Our current work **aligns** with our mission and vision

### Reflection Questions:

- When was the last time we reviewed our mission and vision?
- Do they still reflect who we are and where we're going?
- What would we change if we were writing them today?

## PHASE 2: CONDUCT A SWOT ANALYSIS

### Strengths (What We Do Well)

- ☐ List 3-5 organizational strengths
- ☐ Identify what makes us unique or effective
- ☐ Recognize our most valuable assets (people, programs, partnerships)

### Weaknesses (Where We Struggle)

- ☐ List 3-5 areas for improvement
- ☐ Identify capacity gaps or resource constraints
- ☐ Name operational challenges we face regularly

### Opportunities (External Possibilities)

- ☐ List 3-5 emerging opportunities in our field
- ☐ Identify potential partnerships or funding opportunities
- ☐ Note trends that could benefit our mission

### Threats (External Challenges)

- ☐ List 3-5 external risks or obstacles
- ☐ Identify funding uncertainties or market changes
- ☐ Note competitive or political challenges

**Team Exercise:** Conduct a 60-minute SWOT session with diverse voices from across your organization.

## PHASE 3: SET YOUR STRATEGIC PRIORITIES

### Identify Top Priorities

- ☐ Based on our SWOT, what are our **2-3 most important strategic priorities**?
- ☐ Do these priorities **directly support** our mission?
- ☐ Are these priorities **realistic** given our capacity?
- ☐ Can we clearly explain **why** each priority matters?

Priority 1: \_\_\_\_\_

Priority 2: \_\_\_\_\_

Priority 3: \_\_\_\_\_

## PHASE 4: CREATE SMART GOALS

For each priority, create at least one SMART goal:

### Priority 1 Goal:

**Specific:** What exactly will we accomplish?

**Measurable:** How will we know we've succeeded?

**Achievable:** Is this realistic with our resources?

**Relevant:** Does this support our mission?

**Time-bound:** When will we complete this?

**Priority 2 Goal:**

**Specific:** What exactly will we accomplish?

**Measurable:** How will we know we've succeeded?

**Achievable:** Is this realistic with our resources?

**Relevant:** Does this support our mission?

**Time-bound:** When will we complete this?

**Priority 3 Goal:**

**Specific:** What exactly will we accomplish?

**Measurable:** How will we know we've succeeded?

**Achievable:** Is this realistic with our resources?

**Relevant:** Does this support our mission?

**Time-bound:** When will we complete this?

**PHASE 5: BUILD YOUR IMPLEMENTATION PLAN**

**For Each Goal:**

- ☐ Assign an **owner** (who's responsible?)
- ☐ Break it into **action steps** (what needs to happen?)
- ☐ Set **deadlines** for each step
- ☐ Identify **resources needed** (budget, people, tools)
- ☐ Schedule **progress check-ins** (monthly or quarterly)

**Example Implementation Template:**

Goal	Owner	Action Steps	Deadline	Resources Needed	Check-in Date
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## PHASE 6: ESTABLISH ACCOUNTABILITY

- ☐ Schedule **monthly or quarterly** strategy review meetings
- ☐ Create a **visible dashboard** or tracker everyone can access
- ☐ Assign someone to **track progress** and send updates
- ☐ Build in time to **celebrate wins** along the way
- ☐ Set a **6-month review date** to assess and adjust

## PHASE 7: COMMUNICATE THE PLAN

- ☐ Share the plan with **all staff**
- ☐ Present the plan to the **board**
- ☐ Include strategic priorities in **onboarding** for new team members
- ☐ Reference the plan in **team meetings** regularly
- ☐ Make the plan **easily accessible** (shared drive, printed copies, dashboard)

## PHASE 8: BUILD IN FLEXIBILITY

- ☐ Schedule **quarterly reviews** to assess progress
- ☐ Create space to **pivot** when circumstances change
- ☐ Allow goals to be **adjusted** based on learnings
- ☐ Don't treat the plan as **set in stone**—it's a living document

## RAPID-FIRE COACHING PROMPTS

Use these questions in your next team meeting or board retreat:

- ☒ What's one thing we're doing that no longer serves our mission?
- ☒ Who owns each of our top three priorities?
- ☒ How do we define success, and are we measuring it?
- ☒ When's the last time we celebrated a strategic win?

## YOUR 90-MINUTE QUICK START

Don't have time for a full planning process? Try this:

**Minute 0-15:** Review mission and vision

**Minute 15-30:** Quick SWOT analysis

**Minute 30-50:** Identify 2-3 top priorities

**Minute 50-75:** Set one SMART goal per priority

**Minute 75-90:** Assign owners and set check-in dates

## NEED MORE SUPPORT?

**Podcast:** Listen to Episode 1 at [missiondrivenpod.com](http://missiondrivenpod.com)

**Blog:** Read the companion post with deeper insights and examples

**Consulting:** Need help building or executing your plan? Contact The Scanland Group at [contact@thescanlandgroup.com](mailto:contact@thescanlandgroup.com) or visit [thescanlandgroup.com](http://thescanlandgroup.com)

*From The Scanland Group:  
Keep leading with heart, keep showing up with purpose,  
and keep creating a world where everyone belongs.*