

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

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 or visit thescanlandgroup.com

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