

Strategic & Annual Planning: **Creating & Interlocking Activities**

- Are you and everyone in the organization aligned and focused on achieving the vision, mission, and goals of the organization?
 - Are decisions based on data?
 - Are plans converted into actions and results?
 - Are actions accomplished?

Align long-term and short-term priorities, resources, and actions to achieve the organization's goals using a **data-based strategic and annual planning process**. The process uses team input and multiple data analyses (community, environment, customers, employees, financial, organization, and processes) along with a prioritized SWOT analysis to create 1) strategic initiatives with goals, measures, timelines, and resources; 2) Immediate interlocking to Annual Work Plans; 3) Team member activities and projects; and alignment of team and individual activities.

Align long-term and short-term priorities, resources, and actions to achieve the organization's goals using a data-based strategic and annual planning process. The process uses team input and multiple data analyses (community, environment, customers, employees, financial, organization, and processes) along with a prioritized SWOT analysis to create 1) strategic initiatives with goals, measures, timelines, and resources; 2) Immediate interlocking to Annual Work Plans; 3) Team member activities and projects; and alignment of team and individual activities.



Deliverables:

- A 3-5-year Strategic Plan
- A 1-year Annual Improvement Work Plan
- Continual quality improvement methods and techniques to effectively manage the plans throughout the year
- Achieve your goals **FASTER, EASIER, and with BETTER QUALITY**
 - Measurable Outcomes for the organization and customers
 - 3-8 projects to produce the needed outcomes
 - Project teams with gap, goal, team members, timeline, and approach
- Increased understanding of the organization and customers' improvement wants and needs
- One-on-one application coaching time

Benefits:

- The strategic and annual plans lead to
- **Clearly defined strategies** to communicate throughout the organization
 - Improved **priority setting and matching resources** to strategies
 - Strategies that are converted / interlocked into annual improvement projects and **everyone's' daily work**
 - In daily work activities, everyone knows **how to impact and help** achieve the organization's mission
 - **Goals achieved or exceeded more efficiently and effectively**
 - **Improved products, services, and experiences for customers**

Strategic Plan:
Leadership

OUTCOME: TO Accomplish Your Mission
DRIVERS : BY Strategies You Determine

Annual Plan:
Leadership

OUTCOME: TO Execute Your Strategies
DRIVERS : BY Identifying the Projects That Will Be Executed this Year

Annual Plan:
Project Teams

OUTCOME: TO Execute Your Projects
DRIVERS : BY Identifying the improvement method, solutions and actions needed to achieve the project goal

Knowledge and Skills Gained:

- Ability to collect, analyze, and use data to drive decisions
- Strategic and annual planning process to follow for future planning- step by step (including what to expect, what skills are needed, what improvement methods to employ)
- Templates and job aids for future planning, learning, communication, and effectively managing the change.