



## STRATEGIC PLANNING PROJECT EXAMPLE

### BHAG Development, Needs and Assets Analysis

#### MEETING ACTIVITIES

1. Welcome and Introduction
2. Departmental Overviews and Introductions
3. Overview of Strategic Planning Process
4. Meeting Goals and Objectives
5. BHAG
6. List and Identify Strengths, Weaknesses, Opportunities and Threats
7. Discuss Strategic Planning Process and What's Next

## OVERVIEW OF STRATEGIC PLANNING PROCESS



## LET'S DREAM!

Where are we now and where do we want to be?

We hope to identify a specific place you dream your organization to be 10-20 years from now. This is something that feels like a stretch today, but could be realistic. It needs to be a **BHAG...Big Hairy Audacious Goal!**

Jim Collins 5 Criteria for a good BHAG

1. Set with understanding, not bravado- this is understood based on who we are and who we are supposed to go after. It is not just a dream plucked from the sky.
2. Fit squarely within the organizational vision- it must be in the center and if it's not, then there needs to be adjustments made to get it to the center.
3. It needs a long time frame: long-term goal that the steps to get there cannot be currently imagined
4. Clear, compelling and easy to grasp- understandable, helps in decision making, and easy to get everyone's mind around
5. Directly reflect the core values and purpose of the organization- it cannot be contrary to our purpose. If it is then there needs to be adjustment in vision, purpose, and goals.

**Bad BHAGs are set with Bravado, Good BHAGS are set with UNDERSTANDING**

*BHAGS look into the future and say, "when we get to the end, this is where we are going to be."*

***Then we will work to set annual goals with a shorter sited focus (3-5 years), based on the BHAG(s) developed.***

This discussion will entail considering where you are today and where you need to be...This begins the process of identifying what you need to start/stop doing and what you need to do better.

### **Activity**

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Take time as a group to do the following:

- Discuss the big picture vision for your organization, what you want it to look like in 10-20 years
- Identify possible BHAGs and narrow that down to 1-3 in order of priority

## ANALYZE NEEDS AND ASSETS

To properly identify Needs and Assets, it is essential to think about 2 different things:

- What you...

*\*To access the full document, please email [info@caldwellbg.com](mailto:info@caldwellbg.com)\**