



From Tactical to Strategic Thinking

A Guide to Developing a Strategic Plan

Workshop Objective

This training workshop is intended to provide Cooperatives (Board & Staff) with guidance on where to begin, how to get started, and ultimately to develop a Strategic Plan. It will explore all variables both personal and professional; emotional and analytical; internal and external; present and future to drive the direction of the Cooperative's true vision.

Prior to Workshop

Prior to the workshop date, all participants will receive pre-made post-it note pack. They will receive the pack of post-it notes with instruction on exactly what to do with them. The instruction document will include several categories for which they are to jot down just about anything on that topic. For example – “Financial” is the category, the individual will write down financial ideas, financial disappointments, financial successes, financial uncertainty – again just about anything that comes to mind should be considered. There is no limit to the number of post-it notes they have for each category. They are to bring them to the training workshop.

Section I. General Ideas & Definitions

- A. What is Strategic Planning?
- B. What types of things are included in a Strategic Plan?
 - a. Financial
 - b. Marketing
 - c. Maintenance Programs
 - d. Customers
 - e. Staff Development
 - f. Capital Improvement Planning
 - g. Future forecasts
- C. What is Strategic Thinking?
- D. Why is this critical to the Cooperative? What are the real benefits?

Section II. Strategic Thinking – The start to your planning process

- A. Start with Questions – What are the best strategic thinking questions, that when answered, will shed light on “what matters”?



- a. We will review the post-it notes that were completed prior to the workshop to shed light on what's on everyone's mind as an exercise to this topic.
- B. Key Elements – Review & discuss the six key elements of strategic thinking.
- C. Mission Statement – Clearly state your vision, purpose and values.

Section III. VMOSA

This section will use the VMOSA model as a guide to developing the strategic plan's foundation.

- A. Vision – The Dream
- B. Mission – The What & Why
- C. Objectives – The How Much By When
- D. Strategies –The How
- E. Action Plan – The Implementation

Section IV. Review Case Study

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| A. Case Study #1 | Suburban City |
| B. Case Study #2 | Public Health Nursing Service |

Section V. Strategic Planning Workbook

In this section we will revisit the post-it note exercise – and select the “critical situations” from those (specific to this Cooperative). We will then work through developing a strategic plan (the entire process) for at least two of these situations (maybe three depending on time).

Section VI. Quality Control

Questions to ask of each component of the strategic plan to ensure it is comprehensive, robust, inspiring and implementable.