

Strategic Planning Checklist – Critical Mistakes

Thinking—Planning to plan		
#1	<i>Not having committed and visible leadership</i>	<ul style="list-style-type: none"> Are there senior leaders (president, chancellor, provost) willing and able to lead the strategic planning process?
#2	<i>Not seeking and using expert advice</i>	<ul style="list-style-type: none"> Are individuals with specific skills associated with strategic planning identified within the institution (or outside experts); and is there a commitment to broader training among committee members?
#3	<i>Not reflecting on past planning</i>	<ul style="list-style-type: none"> Is the institution and its leaders aware of previous strategic plans, implementation efforts, and conduct a “lessons learned” exercise?
#4	<i>Not conducting pre-planning</i>	<ul style="list-style-type: none"> Is there a commitment to develop and document a robust description of how the extended strategic planning process will take place and who will be directly involved?
#5	<i>Not communicating pre-planning</i>	<ul style="list-style-type: none"> Is the leaders and experts committed to communicate with the institution’s stakeholders about how the planning will proceed?
Planning—Creating the document		
#6	<i>Not asking and answering basic questions</i>	<ul style="list-style-type: none"> Will leaders, experts and committee members conduct research about best practices associated with its mission, vision, and values and their relationship to the strategic plan?
#7	<i>Not being brutally honest</i>	<ul style="list-style-type: none"> Do the leaders, experts and committee members understand the necessity to engage in courageous conversations about problems and challenges that are facing the institution?
#8	<i>Not challenging the status quo.</i>	<ul style="list-style-type: none"> Does everyone involved understand that the process is designed not to reinforce the status quo but rather to challenge assumptions?
#9	<i>Not doing your due diligence</i>	<ul style="list-style-type: none"> Is there a willingness and ability to generate comprehensive data sets and trends about internal processes and external environments?
#10	<i>Not aligning people, policies and practices</i>	<ul style="list-style-type: none"> Does everyone involved understand the importance to align the internal units within a “loosely-coupled” institution and with key external government agencies and accreditor entities?
#11	<i>Not choosing priorities</i>	<ul style="list-style-type: none"> Is there a process being used to ensure that proposed actions are not merely part of a “wish list” but actually reflect institutional priorities?
#12	<i>Not linking planning and budgeting</i>	<ul style="list-style-type: none"> Is there a rigorous methodology in place to identify the costs associated with strategic priorities that are connected to revenue flows associated with a budgeting process?
#13	<i>Not measuring success</i>	<ul style="list-style-type: none"> Are the leaders, experts and committee members willing and able to create objective measures associated with its action items and priorities?
Doing—Making it happen		
#14	<i>Not working the plan</i>	<ul style="list-style-type: none"> Are the leaders committed to implementing the strategic plan such that is as an actionable, on-going process over its entire stated timeline?
#15	<i>Not owning the plan</i>	<ul style="list-style-type: none"> Are there individuals assigned with the responsibility for the completion, or necessary adjustment, of the identified action items and priorities?
#16	<i>Not selling the plan</i>	<ul style="list-style-type: none"> Do leaders and champions look for opportunities to speak to the importance of the strategic plan throughout its implementation phase?
Learning—Reflecting and adjusting		
#17	<i>Not learning continuously</i>	<ul style="list-style-type: none"> Are there overt and robust reflective practices that both celebrate successes and embrace opportunities for continuous improvement in the planning cycle and inform the next planning process as well?