Set
a Successful Strategic Course

Whether you are embarking on a strategic planning process, reviewing or making strategic decisions, here are the critical factors that will help ensure success. Use the checklist to develop, reinvigorate or enhance your strategic choices.

Note: Strategic choices refer to strategic decisions developed through the strategic planning process or as opportunities and challenges emerge. They may be called strategies, directions, goals and objectives.

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THERE IS TRACTION
There is rigorous assessment

☐ An objective and reliable assessment of the external environment and internal performance uncovers the significant issues.

☐ The formulation of strategic choices draws on a variety of informational inputs (e.g. from diverse stakeholders and through hard and soft data).

☐ The right questions are asked before solving the issues.

☐ There are 'aha' moments in which people see issues or connections that haven't been seen before.

☐ The strategic choices clearly take advantage of the opportunities and mitigate challenges.

☐ The strategic choices are not driven by political or personal agendas.

The strategic choices are clear, substantive and feasible

☐ The assumptions that drive the strategic choices are clearly declared and can be held up for scrutiny.

☐ The strategic choices are directional; they aren't vague statements that are open to interpretation.

☐ The strategic choices are based on a realistic assessment of the available or potential resources and the implications and trade-offs are understood.

☐ The timelines are realistic and the priorities manageable.

☐ There is a consensus about what won't be done and why not.

☐ The strategic choices generate a sense of urgency because they focus on what matters most.

THEY ARE BOLD, FRESH AND RELEVANT
The strategic choices are developed in a creative and challenging environment

☐ The process generates a lot of debate in which many different perspectives are expressed.

☐ Assumptions, 'sacred cows' and the status quo are constructively challenged.

☐ People talk openly about the tough issues and realities.

☐ The process encourages measured risk taking.

☐ The strategic choices are not just a 'refit' of the old solutions.

☐ An array of options are explored before making choices.

They stay relevant

☐ Progress is regularly and reliably tracked.

☐ Monitoring key metrics provides early warning of variations from plans and assumptions.

☐ The leadership is clear about when to quit or modify a strategic choice and how to decide.

☐ The strategic choices are versatile enough to address new opportunities and challenges.

☐ The strategic choices are kept visible when making critical decisions.

THEY ARE WELL EXECUTED
Key stakeholders are committed

☐ The people who must implement the strategic choices participate in their creation.

☐ The leadership team members are ongoing champions of the strategic choices.

☐ Successes and directional changes are communicated continuously to key stakeholders.

☐ The impediments to achieving the strategic choices, such as resistance to change or workload, are addressed.

☐ The strategic choices are integrated into the annual planning process so that they are not seen as an 'add on' to the regular workload.

☐ Staff and Board are held accountable, for example through performance reviews.

The systems, structures and culture are aligned with the outcomes to be achieved

☐ Proper resources are identified and allocated to achieve the strategic choices.

☐ The impacts of the strategic choices on the organizational systems, processes, policies and structures are identified and addressed.

☐ Strategic choices take into account the informal dimensions, such as interrelationships and values.

☐ Staff abilities and competencies are matched or developed to achieve the strategic choices.