



**STRATEGIC PLANNING HELPS
ALIGN ORGANIZATIONAL EFFORTS
WITH LONG-TERM GOALS,
ENSURING EVERY STEP MOVES US
CLOSER TO OUR VISION**





STEPS IN THE ENVISION / ALIGNMENT PROCESS

1. DEVELOP STRATEGY TEAM

- Utilize RASCI

2. "DOING" DEVELOP ENGAGEMENT S-POP

- Contains the 5W and H of the engagement

3. "BEING" DEVELOP LEARNING CURRICULUM

- IDI
- LIFO
- Inclusion Index

6. CONFIRM BEHAVIORAL EXPECTATIONS AND COMMITMENT



DISCOVERY AND REVEAL





STEPS IN THE DISCOVERY AND REVEAL PROCESS

1. PRE-AUDIT PROCESS

- Determine the qualitative and quantitative data

2. QUANTITATIVE DATA

- HR People Metrics (e.g., representation, terminations, promotions, pay, etc.)
- Engagement and other internal surveys (e.g., onboarding and exit surveys)
- IIS and other external survey

3. QUALITATIVE DATA

- Listening sessions
- Focus groups
- Stakeholder Interviews
- Policy, Procedure, and Practices review
- Social media

4. DEVELOP FINDINGS

5. DETERMINE THEMES

6. MAKE RECOMMENDATIONS

7. DEVELOP AND SHARE REVEAL PRESENTATION

REIMAGINE





STEPS IN THE REIMAGINE PROCESS

1. ASSESS THE CURRENT STATE

- Information from the **DISCOVERY / REVEAL PROCESS**.

2. DESCRIBE THE DESIRED STATE

- Leverage S-POP from **ENVISION/ALIGNMENT PROCESS**.



3. DEVELOP A VISION STATEMENT

- Craft an inspiring, concise, future-focused vision that closes the gap to capture desired outcomes.



4. CREATE A MISSION STATEMENT

- Define the actions and core approach to achieve the vision with clear, purposeful language.



5. ESTABLISH GOALS AND STRATEGIES

- Set clear goals and outline actionable strategies that bridge current and desired states.



6. CONFIRM COMMITMENT

- Obtain verbal commitment to the plan and provide learning and resources for individuals to succeed

ACTUALIZE ←





STEPS IN THE ACTUALIZATION PROCESS

1. DEVELOP ACTIONS TO SUPPORT STRATEGIES

- Using Assumption Testing from

2. CREATE EQUITY CENTERED METRICS TO MEASURE GOAL ATTAINMENT

- Leverage Equity-Centered Metrics Framework

6. TRANSPARENTLY COMMUNICATE PROGRESS

- Develop a communications and networking strategy to raise organizational awareness and buy-in

REGULARLY CONFIRM ALIGNMENT AND RE-ENVISION

3. DEVELOP PROJECT CHARTERS

- Project charters utilize original RACSI pull Goals, Strategies, Actions and Metrics together

4. EMBED PROJECT CHARTERS WITHIN GOVERNANCE PROCESS

- Ensure projects are incorporated into the way the organization manages itself.

5. ESTABLISH MONITORING AND ACCOUNTABILITIES

- Embed metrics in leadership and team goals

