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Strategic Planning Five Minute Needs Assessment

Source: Centre for Simplified Strategic Planning

This self-assessment was designed by the Centre for Simplified Strategic Planning. For more information on the Centre visit <http://www.cssp.com>.

How the self-assessment can help BPIR members...

This simple self-assessment tool consists of 15 questions to evaluate your company's approach to strategic planning. The tool is designed for busy people who want results fast. Through completing the quiz, you can rate your company's performance with regard to the most critical elements of good strategic planning and management. Simple suggestions for improvement are provided.

Background

Success in today's business environment requires that a company's leaders have the ability to create a vision of the organization's future *direction* as well as the *course* it needs to get there. Poor strategic planning is worse than no strategic planning. It can be a big waste of time and money. Or even worse, it can lead to a strategic disaster.

What is Strategic Planning?

The term "strategic planning" refers to a coordinated and systematic process for developing a plan for the overall course and direction of the endeavour or enterprise for the purpose of optimising future potential.

What are the benefits of strategic planning?

While there are many very real ancillary benefits, they all fall under the umbrella of the primary benefit which is to optimise the organization's future potential through the formulation and realization of a well-thought-out, sound, and appropriate overall course and direction.

How can we be confident that our planning will be successful?

Even in the presence of a structured strategic planning process, it is quite possible to formulate unsound, inappropriate strategy and/or to fail at implementation. There are many pitfalls, such as lack of commitment and involvement; inadequate process understanding; lack of conceptual focus; complexity; getting off base; inadequate analysis; rigid, mechanistic adherence to some pet theory; poorly conceived action plans; inadequate understanding of resource requirements and availability; planning not integrated into regular management process; assumption/presumption errors; inflexibility; failure to monitor progress and developments; etc.

The self-assessment

For each statement insert your score based on the following 1 = Strongly Agree, 2 = Agree, 3 = Disagree, 4 = Strongly Disagree	Your Scores
1. Top executives take formal responsibility for the organization's Strategic Planning.	
2. Strategic Planning is a top priority activity that is performed on a regular basis.	
3. Our company consistently follows a defined set of procedures in our Strategic Planning process.	
4. Our organization has written goals and objectives.	
5. Our objectives are measurable and have associated action plans with a time frame and specific resource allocations.	
6. Our company regularly assesses its operating environment including information about our markets and customers.	
7. Our external analysis identifies key opportunities and threats	
8. Our company analyses its business operations objectively.	
9. Our internal analysis identifies the key strengths, weaknesses and competencies of the organization.	
10. After reviewing our internal and external analysis, the strategic diagnosis culminates in identifying key strategic issues.	
11. Our company has a written strategy and makes strategic decisions based on the Strategic Plan.	
12. Our company clearly assigns responsibility for action plan implementation and reconciles resource allocation and availability.	
13. Our company reviews its strategic progress regularly and revises strategic decisions as appropriate.	
14. Our company has aligned everyone in the organization with our strategy.	
15. We achieve at least 75% of our strategic objectives.	
Your Total Score is	

Scoring

Total Score < 20. This indicates that your company has an excellent culture of Strategic Planning and Management.

Total Score from 20-30. This suggests that your company has a structure in place with which to build on, but could use some fine-tuning.

Your score >30. This suggests that your Strategic Planning and Management efforts have significant deficiencies. Addressing these should be a top priority.