

KOPPLIN & KUEBLER

Seven Steps of Strategic Planning

- 1. Canvas the club; we need to understand the external and internal factors that determine the satisfaction and also the desires of the membership. Review all information on the Club operations including previous surveys, long-range plans, membership categories, financial and governance data and any other information regarding the club that would assist us in better understanding the current state of the Club.**
- 2. The “why for the what.” How do we define our “charter” to create this plan and what are the “core values,” the “mission statement” and “vision statement” for the Club, which would drive this plan? Through a “SWOT” exercise we identify the initial key strategic issues facing the Club.**
- 3. Build consensus and “buy in” to the plan by conducting focus group sessions with staff, member and Committee groups reviewing the strategic issues identified by the Board also identifying others suggested by the group.**
- 4. Review of the data; interpret the data and calibrate the information, creating what you believe, based on each of the first three steps, the key issues and drivers are for the Club.**
- 5. The Board and Executive team would construct the plan and focus on the top five issues in each area of the Club. Define where the accountability will fall for the accomplishment of each objective, along with target dates for achievement, how they will be measured for success, and so on. Create an “Action Plan”**
- 6. Develop the final report, with an Executive Summary including a complete recap on the process, constituency input and the ultimate plan recommendations that guide the decisions made at the Club. The Executive Summary of this report should be shared with the entire membership either in written form or at a “Town Hall” meeting.**
- 7. Monitoring Progress and Results - ensure an ongoing process to measure and celebrate successes and reaction to changes in the environment - “A Living Document.”**