

# Stamats Strategic Planning Checklist



Recognizing that a little preparation can have a big impact on the success of your strategic plan.

## Before you begin the planning process

Take a candid look at your last strategic planning process. What worked (repeat). What didn't (avoid).

Identify political and organizational issues that must be addressed before the planning process begins.

Have a clear understanding of the financial and time resources that are available for implementing the plan. Make sure these resources are sufficient.

Begin to manage expectations about how long the planning process will take, who will be on the team, and the benefits strategic planning offers the institution.

Identify a planning model that best suits your institutional context.

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## Who should be on your planning team

The composition of your planning team will have a huge impact not only on the plan itself, but on its implementation. With that in mind, we believe that the following people should be on the 8-10 person planning team:

The president of the institution (provides political leadership).

The chief finance officer (provides financial resources).

The VP or Director of Marketing and Communications.

The person responsible for overseeing the implementation team (provides continuity).

1-2 senior faculty who have an institutional (strategic) rather than a department view (increases ownership).

Rather than people with impressive titles, include 3-4 people with impressive abilities. In other words, stack the team with doers rather than thinkers.

A member of the loyal opposition. It is generally better to include this person in the planning process rather than having her or him lob grenades from the outside.

## Who should not be on your planning team.

Because some people can delay or even derail the planning process, don't include the following people on the planning team:

People who are overly political or have overly rigid ideas on the institutional direction.

People with an axe to grind.

People who prefer talking about issues rather than creating options for dealing with issues.

People who are not comfortable considering or making decisions based on data.

People who cannot keep confidences.

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## To increase the odds of successful implementation

Use an outside planning facilitator.

Conduct the research for the [situational analysis](#) before you begin planning.

Create a shorter (rather than longer) planning calendar.

Create a smaller (rather than larger) planning team. Use ad hoc groups to gather input from key constituents. Make sure these groups have a clear understanding of their role in the planning process before they are recruited.

Don't include elements in the plan that are clearly beyond your current resource base.

Make sure your implementation team includes key members of the planning team and is empowered by the president and senior leadership.

Include a clear, calendar-driven implementation process.

Inisist on clear metrics for gauging progress.

Communicate progress internally.

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Have questions about this checklist, please contact: **Marianne Sipe** at [stamats.enrollment@stamats.com](mailto:stamats.enrollment@stamats.com)

## Other resources from Stamats

- [Sender's Remorse: How to Recover When Student Messaging Goes to the Wrong Audience](#)
- [Refining Email Messages for Dual-Enrolled Students](#)
- [Communication Timing: Send Students the Right Recruitment Message at the Right Time](#)