



Designing and Executing a Successful Strategic Plan – Workbook

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Learning Objectives

1. Understand the key elements of **designing an effective planning process** that is **collaborative** and **performance-driven**
2. Identify key strategies to successfully execute on strategic planning, including **prioritization, communication and tactical planning** that considers **limited resources**
3. Identify approaches to **monitoring, evaluating, and measuring** a multi-year strategic plan
4. And much more....

Warm Up

- Take notes on the names and backgrounds of those at your table

Facilitated Discussion

- What does strategy mean to you?
- What organizations do it well?

Facilitated Discussion

- What does strategy look like at your organization?
- Take notes on what others share about their organization's approach to strategy.

Facilitated Discussion

- What does your organization measure? How/do you share results?
- Take notes on what others share about what their organizations measure and how they share results.

Strategic Plan Canvas

FOUNDATION

OUR MISSION – Why do we exist?

OUR VISION – Where are we going?

OUR CORE VALUES – How will we behave?

COMPETITIVE ADVANTAGE & STRAT.

How will we win?

How will we play?

PRIORITIES (3 - 5YEAR), STRATIGIC INITIATIVES (2- 3 YEAR), TACTICS (6 – 12 MONTHS)

PRIORITY AREA

Strategic Initiatives

Annual Plans/Tactics

PRIORITY AREA

Strategic Initiatives

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PRIORITY AREA

Strategic Initiatives

Annual Plans/Tactics

KEY PERFORMANCE INDICATORS

How we measure success?

CAPABILITIES NEEDED

What needs to be true to achieve our goals?

COMMUNICATION PLAN

How will we manage change?