

Refresh – An Introduction to Strategic Planning

by JANIE RAFFIN

Planning is essential – no matter how small you are. Nobody will take you seriously unless you can show that you know where you are going.

The aim of this session is to give you some of the basic “tools” to develop a strategic plan for your organisation. Some you can do; the rest needs to be done with all the other players or stakeholders or they won't feel ownership and it will be your plan not theirs, and will have little chance of success.

What

- What business are you in? - provide an outline sufficient for outsiders to fully understand what services you offer your customers
- What are the unique features?
- What is your financial situation?
- NOW - and what is your projection for the future? What proof do you have that you can achieve this? (Add anything that reinforces that you will be successful, eg, successful promotional strategies, recognition from LG, etc.)

Who are the key players?

- Have you listed the “key” stakeholders?
- Described their level of employee motivation? (paid or volunteer) eg what is the degree of absenteeism?
- Are all the players (if staff, this means all staff and volunteers) actively involved in running the organisation? Describe the systems in place which encourage everyone to make comments.
- What are the levels of remuneration? (satisfaction, appreciation and belonging as well as expenses, if not salaries).
- What information is available: are there Job Descriptions, a Procedures Manual and/or an Organisational Chart (listing who is responsible for what)?
- Have you listed the knowledge skills needed (Skills Audit). Describe any training programs or procedures that have resulted from this process.

Where

- How big is your total market?
- Have you broken down into sub-markets or market segments? (eg newcomers, retired, NESB, Aboriginal community, schools, universities, adult education, service organisations, business community)
- Have you considered the external factors that could affect you? (public transport availability, local government election and new councillors, changes in what clients are looking for etc.)

Who comes; and what are their needs?

Have you

- assessed the entries in the visitors' book
- recorded key impressions from talking to visitors
- distributed surveys to people who come - or to people who DON'T come
- designed a simple visitor satisfaction card
- invited a small group for coffee to find out what they like, don't like, and would like to see happen (Focus groups)

Once analysed, changes can be made to any aspect of your operation to better meet the needs, eg

- opening hours
- display
- labels (larger? in more than one language?)
- promotion
- brochures - (incorporate identified interests)

SWOT need to address all areas *ie.*, Organisation & Management, Human Resources, Marketing, Product, Customer Promotions and last but not least, Finance.

	Your assessment	- which means that
Strengths	Good reputation Good communication skills	People seek us out Ability to understand visitor needs & interests
Weaknesses	No knowledge/understanding of youth in the area	Need to research and analyse this sector
Opportunities	Large NESB population	Opportunity to target these groups
Threats	Tourism Office directing visitors elsewhere	Need to take a more active role in local tourism

Mission statement

Do you have one? If so, is it up to date and relevant?

Planning session

Held on a Saturday or Sunday (11am - 4pm) with all “key” stakeholders. This can take the form of (a) Brainstorming if you have a facilitator who understands the process so that everyone builds on each other’s ideas. It is a time for positive and creative thinking ONLY - no evaluation. That comes later as you prioritise, OR (b) break down into small groups of 3 to 5; write down what you would like to see happening, then through consensus prioritise 3-5 ideas to feed back to the group.

Action plan

Action objectives	Milestones or major tasks	Who	When
Organisational & Management	Set up mtgs with all stakeholders (staff, cmttee reps, & volunteers) to ensure ideas are listened to and communal ownership is established; put effective communication tools in place (for community input) - eg ideas box - as well as stakeholders	JR	Feb 01
People (Human Resources)	With the assistance of volunteers, develop a Procedures Manual for the front desk - to include position of light switches, kitchen facilities, environmental controls, volunteer duties, answers to the most asked questions, etc.	ML	March 01
Marketing	Design simple survey; organise ONE focus group mtg per month; write up findings (where customers come from; how many are repeat visitors, visitor benefits (outlined)	DN	April 01
Product Development	Assess surveys and design new exhibitions and education programs to answer the expressed interests and needs.		June 01
Customer Promotions	Develop new gallery image with artist/consultant; review effectiveness of promotion in local tourism brochures; design new promo for identified target audience; search out opportunities for additional editorials	RJ	July 01
Financial	Develop/implement financial systems to clearly identify income against expenditure; plan to eliminate cash shortage in tight periods such as Dec/Jan.	MS	Nov 01

Objectives

Remember SMART objectives must be:

- S specific
- M measurable
- A action oriented
- R realistic & achievable
- T time tabled