STRATEGIC PLAN. Methodology

WHEEL Online Training

Eva M. Pertusa-Ortega

Juan José Tarí Guilló

University of Alicante

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1. Creation of the working group

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1. WORKING GROUP

Creation of a **working group,** formed by 2, 3 or 4 people

Example:
- Person responsible for the service/unit
- Person with personnel under his/her charge
- 1 or 2 employees of the service without personnel under their care
- 1 user of the service. This user can be invited to all the meetings or to any of them

2. COMMUNICATION OF THE PROCESS

The person in charge of the unit / facilitator **explains the process** (it is recommended that all the workers of the unit attend to this session):

- What is going to be done and why
- How it will be done: creation of the work team (stage 1) and explanation of the work plan (individual work and meetings of the work team to prepare the strategic plan)
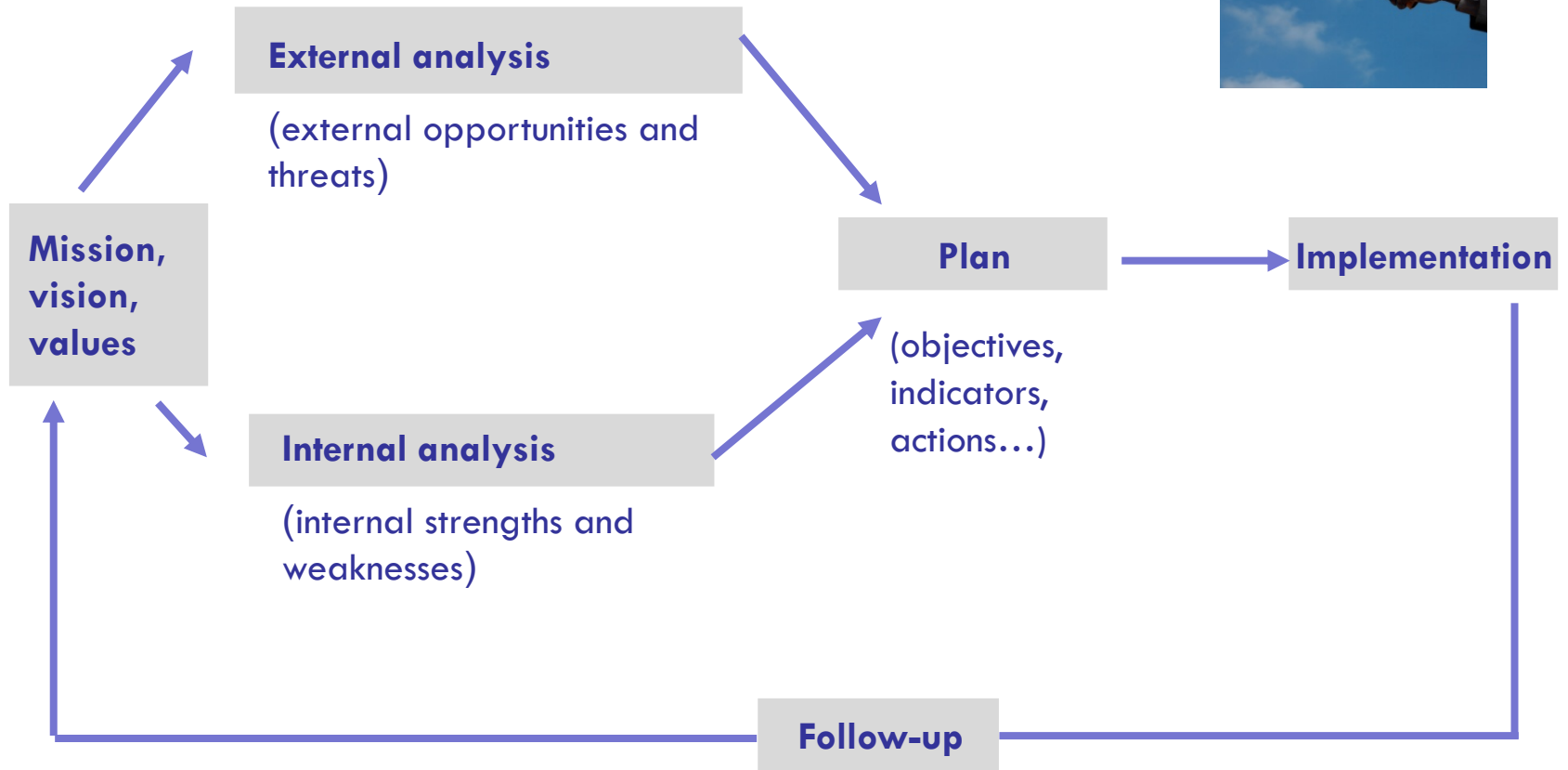
3. DEFINITION OF STRATEGIC PLAN

Team work to define:

- Mission, vision and values
- SWOT
- Objectives, indicators, actions …

Consensus meeting

3. DEFINITION OF STRATEGIC PLAN

Mission, vision, values

External analysis

(external opportunities and threats)

Internal analysis

(internal strengths and weaknesses)

Plan

(objectives, indicators, actions…)

Implementation

Follow-up

3. DEFINITION OF STRATEGIC PLAN

Mission, vision, values and axes

How to define? Example:

Meeting 1
- Each member of the group, individually, defines in paper the mission of the unit
- Conducting a meeting of the work team to discuss the individual missions and finish the meeting by writing a draft mission

Meeting 2
- Each team member individually defines the vision, values and strategic axes
- Group consensus meeting to reach an agreement on: strategic axes, vision and values

SWOT

How to define? Example:

Meeting 3
- Each member of the work team establishes a list of possible strengths, weaknesses, opportunities and threats
- The team reaches a consensus on this list of strengths, weaknesses, opportunities and threats

3. DEFINITION OF STRATEGIC PLAN

Objectives, actions, indicators…
How to define? Example:

Meeting 4
- Each team member defines the **objectives** for each strategic axis
- Group consensus meeting to reach an agreement on objectives

Meeting 5
- Each member of the group individually defines the indicators (and its values or goals)
- Group consensus meeting to reach an agreement on indicators with its values or goals

Meeting 6
- Each member individually defines the actions.
- Group consensus meeting where actions are shared and a list of actions is agreed (person in charge + deadline)

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Objectives, actions, indicators…

How to define? Example:

Code	Strategic axis	Objective	Action	Responsible	Deadline	Indicator	Value

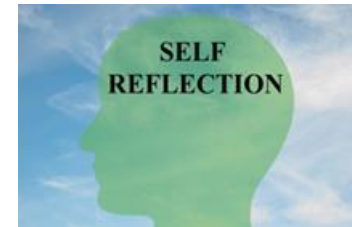| Code	Strategic axis	Objective	Indicator	Value	Action	Responsible	Deadline

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4. COMMUNICATION

1. Send the document to all members of the service to read the document that summarizes the work done by the working group

2. The work team can define a period of one or two weeks to receive suggestions and establish a final consensus meeting to decide the modifications of the document based on the suggestions received

3. Include the modifications in the work document and its approval by the unit director

4. Publication of the document on the unit's website

5. IMPLEMENTATION AND FOLLOW-UP

1. Implementation of the actions established (person responsible for the actions, deadlines, indicator and values)

2. Follow-up

FINAL IDEAS

1. Self-reflection → Mission, vision, values

2. Contextual Analysis → SWOT analysis

3. Plan→ Objectives, indicators & actions

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Finalisation of the activity?

4. Implementation and follow-up

Code	Strategic axis	Objective	Indicator	Value	Action	Responsible	Deadline