

STRATEGY FORMULATION ROADMAP

GOALS:

Broad, long-term aims that define the fulfillment of your mission/vision. These 4-5 goals focus on broad aims, not on activities. **Use infinite verbs: provide, promote, maximize, maintain, and foster. Avoid action-oriented verbs: establish, develop, implement, build, create.**

Sample of goals for a non-profit organization:

- **Advocacy:** advocate on behalf of children and educate and mobilize others to do likewise.
- **Awareness:** be recognized as the statewide leader in affecting positive change for children.
- **Programs:** provide caring, cost-effective programs that produce life-enhancing results.
- **Finance:** maintain the financial resources needed to achieve the mission.
- **Organization:** attract and retain high-quality board members, staff, and volunteers.

OBJECTIVES:

Objectives are targets for EACH GOAL. **Use quantitative verbs: increase, reduce, achieve, maintain, have.**

Use the SMART structure to define objectives:

- Specific
- Measurable (quantifiable)
- Achievable
- Relevant (realistic)
- Time-Bound

STRATEGIES:

Strategies are broad activities needed to achieve an objective. The strategies start with an action (verb), states what is acted upon (object), and explains why (purpose). **Use finite action verbs: establish, develop, implement, build, and create.**

Examples include:

- Develop and implement a marketing strategy to increase client intake interviews.
- Revamp community partnership program to increase referrals.
- Hold quarterly membership fairs to increase member involvement.

PRIORITIES:

Prioritize which strategies to focus on in the near term - for the next quarter or year. Variables for prioritization could include resource allocation, dependency/sequence of strategies, or external factors. What will you focus on for the next 90 days?

DELIVERABLES:

Once the strategies are prioritized, define the deliverables. What does “done” look like and how will you measure it?

Putting It All Together

GOALS - OBJECTIVES - STRATEGIES - PRIORITIES - DELIVERABLES

Goal 1	Objective 1.1	Strategy 1		Deliverables
		Strategy 2	Q1	Deliverables
		Strategy 3		Deliverables
	Objective 1.2	Strategy 1	Q3	Deliverables
		Strategy 2	Q2	Deliverables
		Strategy 3	Q1	Deliverables
	Objective 1.3	Strategy 1	Q1	Deliverables
		Strategy 2		Deliverables
		Strategy 3	Q3	Deliverables
Goal 2	Objective 2.1			
	Objective 2.2			
	Objective 2.3			
Goal 3	Objective 3.1			
	Objective 3.2			
	Objective 3.3			