



# Strategic Planning Toolkit



THE UNIVERSITY OF BRITISH COLUMBIA

Experiential Learning Hub  
Faculty of Applied Science

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# Table of Contents

**Purpose of this Resource**

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**BEFORE Strategic Planning**

---

**DURING Strategic Planning Meeting**

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**AFTER - Next Steps**

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## Purpose of this Resource

Strategic planning is an important part of ensuring a team runs smoothly. It makes sure everyone is working towards a set goal, and prevents delays or disruptions. This resource should go hand-in-hand with a strategic planning meeting – the template is provided for taking notes before, during and after the meeting.

This resource is your go-to guide for transforming your academic and extracurricular achievements into narratives that captivate prospective employers.

As an engineering student, showcasing your accomplishments effectively is crucial for standing out in a competitive field. This toolkit is designed to help you navigate this process with confidence. As a student group leader, many of the topics addressed here will be beneficial to you in the future! Think about the Super Application for example. You can plan out for different topics of the Project Overview section here, such as mission/vision as well as risk assessment.

# BEFORE Strategic Planning

Strategic planning sessions can be extremely useful to: realign, reenergize, and refocus your leadership team. Ideally, you and your team can walk into a planning session with specific objectives, and walk out with clear action plans. A good strategy session can uncover key insights into the team's current and future challenges, as well as determining the priorities and accompanying activities that will move your team forward.

Here are fifteen questions to ask you and your team as you prepare for your strategic plan session. This is merely meant to be a guide – you can reshuffle things as you wish. You don't need to write down the answers per se, just think about the topics:

- **What's the value of accomplishing your strategic plan?** In achievements, impact, member engagement, growth, etc. What is the cost/benefit for you and your team to successfully implement your plan?
- **What's the cost to your team if you don't implement your plan successfully?** Missed opportunities, stress, member engagement, etc. What happens if nothing changes and your team stays on the same trajectory? Is that good enough for you and your team?
- Do you all agree on one approach for creating your strategic plan?
- Is your team willing & able to change in response to the needs of your strategic plan?
- Why was your last strategic plan (if any) successful or unsuccessful?
- Is your entire team sharing the same version of success?
- Do you feel like you have more opportunities than you have time, money & energy to go after? Can your team accomplish them all at the same time?
- If you had to pick a core stakeholder group to focus 70% of your time, money & energy on, who would you choose?
- Do you all agree on what opportunities (competitions, funding sources) need to be prioritized in order to move forward?
- Is your team clear on and bought into your current strategic goals?
- Is your current communication structure sufficient to support your team and thus the implementation of your strategy? If yes, how do you know?
- How does your current culture contribute to or impede the success of your future goals? Can you describe "How we do things around here"?
- How will your team track & monitor the progress of your plan?
- Who is responsible for leading implementation of the strategy?
- **How much time/money/resources do you & your team expect will be required to make this plan successful?** Do you all have the same expectations?

# DURING Strategic Planning Meeting

- PRIMARY TOPICS - MUST BE ADDRESSED**
- What are you doing well? What are you doing less well?
  - Vision Planning
  - Mission
  - Risk Register
  - Strategic Priorities
  - Implementation Plan
  - Next steps

- SECONDARY TOPICS - NICE TO HAVE**
- Team Introductions (especially for bigger groups)
  - Facilitator Introduction, setting up ground rules
  - Discuss goals for the meeting
  - Celebrate wins!
  - SWOT scan
  - PESTLE Trend Analysis
  - Current and Desired Values and Behaviours
  - Communication of the Strategic Plan
  - Takeaways and Reflections
  - Q/A Session

**EXECUTIVE SUMMARY**

**WHAT ARE YOU DOING WELL? WHAT ARE YOU DOING LESS WELL?**

Tip: Uncovering where the team is now is a critical step before deciding where to go next.

**CELEBRATE WINS!**

Any wins recently? Celebrate them!

**SWOT SCAN**

	HELPFUL	HARMFUL
Internal Origin	Strengths	Weaknesses
External Origin	Opportunities	Threats

**PESTLE TREND ANALYSIS**

What’s happening in the world around us that is going to shape the future of our team? Defining current and likely future trends can help us look at the environment at a macro level.

<b>POLITICAL</b>	<b>ECONOMIC</b>
<b>SOCIAL</b>	<b>TECHNOLOGICAL</b>
<b>LEGAL</b>	<b>ENVIRONMENTAL</b>

**3-YEAR VISION**

Where do we want to go? Visioning will help your team clearly explain what success looks like in 3-years’ time.

YEAR 1	YEAR 2	YEAR 3

**3-YEAR MISSION**

The mission exercise will help your team explain who you are, the benefits and outcomes of your products and services, and define your key customers.

Purpose: Why do we exist?	
Who are we?	
What do we do?	
Who do we do it for?	
Where do we want to be in 3 years?	

**VALUES:**

- What are the impacts if we reward non-ideal values?
- What are the impacts when people live our ideal values?
- What specific behaviors can be demonstrated to ensure your values move from implicit to explicit?
- What are the benefits of reshaping your values in your team?
- How can we reshape the values throughout our team?

**CURRENT VALUES & BEHAVIORS**

By defining the values & behaviors that your team currently exhibits (whether good, bad or neutral), you can move on to defining the types of values & behaviors that will help you to reach your desired future state

Good	
Bad	
Neutral	

**DESIRED VALUES & BEHAVIORS**

What do we want to replicate throughout our teams to help us reach our vision?

**RISK REGISTER**

- What risks and uncertainties exist for your team?
- What is the impact and likelihood of them happening, and what can you do about them?
- Risk can both be positive and negative
- Review those that multiply to 16 or higher
- Your strategic priorities will address and mitigate the critical risks based on their rating
- By identifying future risks and roadblocks and deciding which may have the greatest impact and likeliness to derail your implementation success, you can start to prioritize your organizational needs

RISK	IMPACT	LIKELIHOOD	PRIORITY LEVEL	MITIGATION

**STRATEGIC PRIORITIES**

- How do we achieve our vision?
- What are the areas of strategic focus for the next time period that can help mitigate some of the above risks and help you reach your 3-year vision? How are you going to measure success?
- Plan out specific actions - start with a few and then pick one to focus towards.

**GOAL SETTING**

**Formula 1 (with baseline):** Go from BASELINE to TARGET by DATE

**Formula 2 (no baseline):** Do X ITEM to extent of TARGET by DATE

**SMART GOALS**

Setting SMART goals will help your team to define what success looks like in these Strategic Priority areas, which will help you to track and monitor progress while executing your plan.

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

- Find items that everyone can help on.
- Everyone must be on the same team before moving on.
- By focusing on three to five focus areas in your planning cycle (Strategic Priorities), your team will start to make strategic choices.



**STRATEGIC PRIORITY #1 (SP1)**

Priority	
Objectives & Goals	
KPI (Key performance indicators)	

**STRATEGIC PRIORITY #2 (SP2)**

Priority	
Objectives & Goals	
KPI	

**STRATEGIC PRIORITY #3 (SP3)**

Priority	
Objectives & Goals	
KPI	

**IMPLEMENTATION PLAN**

What do you need to do first (urgent & important) to begin to move forward on your goals and priorities? You can continue to build on this action plan as you move forward with implementation.

SP1		
Milestone/Deliverable	Responsibility	Target Completion Date
Goal 1		
Goal 2		
Goal 3		
SP2		
Milestone/Deliverable	Responsibility	Target Completion Date
Goal 1		
Goal 2		
Goal 3		
SP3		
Milestone/Deliverable	Responsibility	Target Completion Date
Goal 1		
Goal 2		
Goal 3		

**COMMUNICATION OF THE STRATEGIC PLAN**

- What are you going to do to communicate and share your strategic plan throughout your team?
- Who needs to know what, by when and to what extent?
- What communication structures do you need to put in place internally to be successful (ex: review cycles)
- Where can you incorporate strategy discussions into existing communications?

Milestone/Deliverable	Responsibility	Target Completion Date
Meet as a strategy team to debrief and follow up on strategic plan		

**TAKEAWAYS AND REFLECTIONS**

What’s the most important action everyone can take?

**Q/A SESSION**

Write down any questions you found interesting.

Once you have priorities and goals set, you can narrow down the key actions that your team needs to take in order to make progress

**AFTER THE STRATEGIC PLANNING MEETING**

Once you’ve completed your strategic planning process, the planning work is not over. It’s important to make sure that prior implementation that you’ve:

- Solidified your priorities and defined SMART goals
- Documented your plan in a digestible way
- Developed a communication plan to share and cascade your strategy throughout your team
- Booked a time to create your implementation plan
- Set up a system to track and monitor your progress

# Resources

## Still have questions?

You can book an advising appointment with Minoli Navaratnam ([minoli.navaratnam@ubc.ca](mailto:minoli.navaratnam@ubc.ca)) in APSC Professional Development. We can:

- Review your worksheets or the content of this module.
- Discuss any other questions you may have.



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