

Holistic Strategic Planning Framework

1. Strategic Idea
The concept of our future impact
<ul style="list-style-type: none"> - Strategic Concept - The Big Dream (our Ultimate Goal) - Discovery Phase
2. Organizational DNA
Who we sincerely are?
<ul style="list-style-type: none"> - Core Competencies (things we do best) - Values and Guiding Principles - Culture and Ethics (Business Style) - Unique Characteristics (Differentiators) - Organizational Purpose
3. Strategic Analysis
Seeing the big picture and finding important details
<ul style="list-style-type: none"> - Industry and Stakeholder Analysis (Competitors & Customers at least) - Strategic Tools & Analytical Frameworks (SWOT, PESTEL, 5 Forces, Ansoff Matrix and many others, choose whatever works for you) - Trends and Foresight (variable/definite trends, scenario alternatives) - Scenario Planning - Strategic Challenges - Hypotheses already tested and Outcomes obtained - Where We Are Now (current state of things)
4. Strategic Sense & Meaning
Why do we exist?
<ul style="list-style-type: none"> - Vision - Mission (deriving from Organizational Purpose) - Long-term Aspirations

5. Strategic Focus & Game Changers
Focusing and differentiating factors for our claim to win
<ul style="list-style-type: none"> - Primary Choices and Focus - Business Boundaries (where we intentionally do not go to keep the main focus) - Technology Innovations, Disruptors, and Secret Ingredients (the Blue Ocean, innovations, and game changers, if any)
6. Strategic Goals Tree
Goals and objectives (usually 3-5-10 years)
<ul style="list-style-type: none"> - Key Long-term Goals - Objectives and Key Results (all measurable)
7. Strategic Initiatives & Programs
A synergistic set of initiatives to implement the main strategy
<ul style="list-style-type: none"> - Initiatives, Programs, Projects (both functional and cross-functional, these are among the most important parts of any strategic plan) - Vital Organizational Habits - Functional Strategies (Marketing, Sales, Talents, Finance, R&D, etc.) - Instruments and Tasks (very optional here but essential for every functional strategy or plan) - Resources Allocation (failure to support the strategy with resources leads to execution failure)
8. Strategy Success Metrics
What's going to be on our dashboards at every level?
<ul style="list-style-type: none"> - Key Performance Indicators - Success Criteria and Alert Zones - Critical Success Factors - Monitoring Rules, Cycles, and Formats

9. Useful Strategy Components
Very much recommended to do at any life cycle
<ul style="list-style-type: none"> - Strategic Statement (one-phrase or one-paragraph strategy) - One-page Strategy or Strategy Map - Business Model Canvas (or Lean Canvas for early startups) - Persuasive Unique Sales Proposition and Value Proposition (ideally if customized separately for your key stakeholders, not only customers) - Target Organizational Structure (necessary changes in organizational model and roles to implement the strategy)
10. Risks & Risk Management
Attention here essentially raises the chances for success
<ul style="list-style-type: none"> - Key Anticipated Risks and Viable Solutions (preventive, neutralizing, or mitigative) - Stress-testing and Validation - Contingency Plans
11. Strategy Execution Discipline
How are we going to successfully execute the strategy?
<ul style="list-style-type: none"> - Strategy Owners (accountability tree) - Implementation and Operational Planning - Strategy Review Cycles and Formats (for adaptation and agility) - Overcoming Change Management Resistance - Implementation-fostering Culture - Clearly Linking Every Role, Daily Actions, Authority and Motivation to Strategy Performance (managers' task at all levels) - Board-level Control and Other Non-execution Fuses
12. Strategy Communication Plan
How do we link all stakeholders for clarity, synergy, and agility?
<ul style="list-style-type: none"> - Who is responsible for 360-degree communication of strategy? - Detailed Communication Plan (for all stakeholders) - Strategy Artifacts (all kinds of reminders, feel free to be creative here) - Feedback and Continuous Improvement (another fuse for agility)



Holistic Strategic Planning Framework - Recommendations for Use

- **Customization is Key:** Tailor the framework to your organization's needs. Select the components that align with your resources and goals to create a feasible strategy. Skip everything that is irrelevant in your case.
- **Avoid Overthinking:** Don't succumb to "analysis paralysis." Focus on lean but sufficient exercises that provide actionable insights without overwhelming your team. Some of the points may only need a quick discussion.
- **Iterate and Be Agile:** Be open to adjustments throughout the planning process. If you find the need to refine earlier stages, embrace an iterative and agile approach.
- **Engage Your Team:** Involve your core team throughout the entire process. Ensure they are co-authors and co-owners of the final strategy to boost commitment and execution.
- **External Guidance:** Consider seeking external expertise if needed. An external strategist or moderator can provide valuable facilitation and advice, but maintain internal ownership of the strategy.
- **Stay Agile and Adaptive:** In an age of technological acceleration, prioritize agile execution and timely strategic adjustments. Focus on the vital 20% of actions that yield 80% of outcomes.
- **Control What You Can:** Embrace the "dichotomy of control." Concentrate your efforts on influencing factors within your control and accept those outside your control for effective leadership.
- **Customize and Expand:** Customize the framework by incorporating industry-specific or context-specific factors as needed. Skip sections that don't apply to your situation.

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