

Visit: www.StrategicProcessManagement.com/Contact
to request your complimentary strategic planning guide.



Strategic Planning Isn't a Season. It's a System.

If you're starting your strategic plan at the end of the year, you're already behind.

2027 Strategic Planning Starts Now

Day of Discovery # 26



ProStrategy.ai Patent Pending

AI-enabled strategic planning operating system

Almost No One Is Shown How to Build a Strategic Plan

Everyone Knows What Goes Into a Strategic Plan
Almost No One Is Shown *How to Build One*



- Mission, vision, goals, initiatives, metrics—this isn't the mystery
- The failure point is timing, sequencing, and discipline
- Too many organizations try to compress months of thinking into 30–60 days

**Strategic planning fails not because leaders don't care,
but because the work is left too late.**

Why 2027 Strategic Planning Must Start Now

Strategy Requires Absorption Time

**Good strategy isn't decided;
it's internalized.**

Leaders need time to:

- Sit with uncomfortable realities
- Let implications surface
- Adjust thinking without pressure



Rushed strategy reflects availability, not judgment.

Strategic Planning Cannot Be Rushed Without Cost



Deadline →



Strategic Planning Cannot Be Rushed Without Cost

- Rushed plans are reactive
- Rushed plans reset every year
- Rushed plans reflect availability, not strategy

Waiting until planning season to start planning isn't busy...it's irresponsible.

The 7-Step Strategic Planning Progression

- Each step stands alone.
- Each step takes time.
- Together, they make the final plan *inevitable*.



The 2027 strategic plan should already be forming right now.

Step 1 - Strategic Foundation



Establish Strategic Foundation

Direction Before Decisions

- Long-term intent
- Non-negotiables
- Strategic language leadership agrees on

Timing: Early, deliberate

SPM Provides: Foundation frameworks, facilitation guides, documentation standards

**Strategic planning isn't hard because it's complex.
It's hard because it's postponed.**

Step 2 - Organizational Reality

Assess Organizational Reality

Truth before ambition

- Performance patterns
- Capacity and constraints
- Friction points leadership often avoids

Timing: Separate from retreats

SPM Provides: Structured assessments, diagnostic tools, synthesis templates



**Strategic planning isn't hard because it's complex.
It's hard because it's postponed.**

Define Strategic Value Requirements

What must exist to succeed

- Minimum → Competitive → Leadership → Elite
- No initiatives yet...only standards
- Shared understanding of “good enough”
- Definition of “Great”

Timing: Mid-year

SPM Provides: SVA models, scoring guides, AI-supported analysis



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It's hard because it's postponed.**

Step 4 - Department Alignment

Align Departments to the Strategic Path

Reinforcement over competition

- One direction, many contributors
- Conflicts surface early
- Alignment without urgency pressure

Timing: After value is defined

SPM Provides: Alignment workshops, cross-functional mapping, documentation tools



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Step 5 - Strategy Design & Choice

Design & Evaluate Strategic Options

Choosing how...not just what

- Scenarios evaluated before commitment
- Tradeoffs made intentionally
- Strategy becomes defensible

Timing: Before budgets

SPM Provides: Option evaluation frameworks, decision documentation, risk modeling



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It's hard because it's postponed.**

Step 6 - Metrics & Preservation



Establish Metrics, Cadence & Preservation *Making strategy durable*

- How progress will be tracked
- Quarterly visibility
- Preservation of intent beyond leadership changes

Timing: Well before year-end

SPM Provides: Metric frameworks, cadence models, strategic preservation systems

**Strategic planning isn't hard because it's complex.
It's hard because it's postponed.**

Step 7 - Documentation & Board Delivery

Document & Deliver

Confirmation, not creation

- The plan already exists
- Documentation is translation
- Board delivery is clarity, not defense

Timing: End of year, by design

SPM Provides: Board-ready documentation templates and delivery structure



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Strategic Planning, Distributed Across the Year



➤ This working schedule intentionally spaces strategic planning across the calendar, with 2–3 focused leadership sessions every 2–3 months, aligned to each planning phase.

➤ Each stage is designed to be recorded, coordinated, and carried forward using structured models and templates provided by Strategic Process Management (SPM) or adapted to existing internal tools.

➤ By separating the work into distinct phases, leadership gains the time needed for thoughtful analysis and alignment, while avoiding the disruption and shortcuts created by year-end compression.

Support documents, templates and meeting agendas for everything in this deck can be available at <https://strategicprocessmanagement.com/contact/>

Complete the form and check the box of your interest.

If you would like to discuss having SPM facilitate your 2027 Strategic Planning Process, add that request in the notes section and tell us a bit about your organization.

You will be contacted within 24 hours.

Since the SPM planning model is fully documented and based on ProStrategy.ai infrastructure, SPM can facilitate execution of this planning model in as little as 60 days without sacrificing any features or benefits. Of course, the more calendar time you can devote to strategic planning, the less disruptive the planning cycle will be to any team.

**Please complete the form below
and we will be in touch as soon as possible.**

First Name

Last Name

Email

Phone

Please tell us a little about your organization.

We look forward to connecting with you!

- Please send the "Strategic Planning Step by Step for Credit Unions".
- Yes! I would like to learn more about ProStrategy.ai.
- Yes! I would like to schedule a complimentary consultation.

12 + 13 =

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