



## When to Embark on Strategic Planning

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“Strategic planning is . . . consistently ranked among the five most popular managerial approaches worldwide.”

George, Walker, and Monster (2019).

Does Strategic Planning Improve Organizational Performance? A Meta-Analysis.

*Public Administration Review* (79, 6).

- **Your organization never had a strategic plan** and is several years old. A strategic plan can take you to the next level of organizational maturity.
- **Demand is outgrowing your current capacities and systems.** That is also a good time to reevaluate the mission, vision, and core values.
- **Following a leadership transition**, such as a new CEO or executive director. Strategic planning helps align the new leadership's vision with the organization's goals. Planning with the new executive should be done three to six months after the new leader comes onboard.

Tip: Avoid strategic planning with the outgoing leader right before a transition. This will exclude the new leader from putting his or her stamp on the new strategic plan.

- **Periodic review when you already have a strategic plan.** Many organizations engage in strategic planning at regular intervals, often every 3 to 5 years, to assess progress and recalibrate strategies to ensure alignment with long-term goals.
- **When your organization is struggling to meet its goals**, experiencing declining market share, or facing internal inefficiencies, strategic planning helps identify root causes and develop corrective action plans.
- **When your organization is experiencing rapid growth**, strategic planning helps ensure that infrastructure, human resources, and systems keep pace with expansion.
- **When you have completed a merger or acquisition.** Strategic planning ensures that the merging organizations align their goals, resources, and cultures.
- **Organizational restructuring:** When there are shifts in organizational structure, new strategies may be required to reflect the change.
- **When you plan to expand** into new geographical areas or markets, strategic planning helps assess opportunities and risks. The strategic plan can ensure that systems and processes are in place with the bandwidth to scale and accommodate new clients and new staff.
- **Preparing your organization for sale.** Creating a strategic plan with clear goals and objectives will position the organization for good performance.

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