

Strategic Planning Guide

Provided by: Dr. Kimberly Hale, kimberlyjhale.com.

For an editable copy of this document, [click here](#).

Make an Appointment with Yourself

Determine when you'll conduct your strategic planning retreat. Remember you can schedule this how it works best for you. Pick an afternoon to spend away from the office, or use a long weekend to take several days away from your everyday responsibilities.

Set Yourself Up for Success

Here are the things I am always sure to bring/have (your list may vary).

- Phone (set to silent) and charger
- Computer, charger, keyboard, mouse (wifi at my location)
- Planner (hard copy) + cloud calendar
- Colorful pens (for color coding: green = scholarship; red = teaching, purple = service; family = yellow/orange)
- Books - reference books (e.g., grant writing, teaching practices, etc.), personal development books (e.g., [Essentialism](#), [Quite, Reading People](#), etc.)
- Food & Drinks (or be sure your location has access)
- Space to spread out
- Outdoor space to get up and move around
- Comfy clothes

During your Strategic Planning Session

- Determine your priorities for the day
- Review your personal Life Purpose & Direction statement. If you don't have one, you may decide to create one, or skip this for now and just focus on work planning. I crafted mine using resources from [David Allen's book, Getting Things Done](#) (Horizon 5).

- ❑ Review your academic mission statement and goals. Again, if you don't have one you may focus the session on [drafting one](#), or you may skip this for now - although it's hard to make sure you're headed in the right direction with your projects if you don't have this in place.
- ❑ Review progress on current Goals and current projects.
 - ❑ If you don't have a master list of them, now's a good time to build a list.
 - ❑ If you have a list, go through and check off completed items (and CELEBRATE!).
 - ❑ Add notes about what needs to happen next on each current or soon project.
 - ❑ If a project doesn't need to be addressed in the next couple months, put a reminder note (I like to just put an reminder on my calendar app) to trigger a follow up in an appropriate time frame
- ❑ Set goals for the upcoming months (2-3 months).
 - ❑ Family/financial goals
 - ❑ Teaching
 - ❑ Service
 - ❑ Scholarship
 - ❑ Others
- ❑ Determine most important priorities for the coming week.
- ❑ Determine if you need a rejuvenation session or a work session

❑ Finish Your Session Strong

By strong, I don't mean working as hard as you can non-stop. I mean take time to determine the best use of the rest of your time before your strategic planning retreat is over.

If you planned a ½ day session, likely you're time is nearly up and you should spend some time resting and preparing to head back to the "real world."

If you planned a retreat over a day or so, you likely have a bit of time left to use. I highly recommend spending several hours rejuvenating and resting each day.

You can also spend some time working productively on your important projects. Tackling tasks for your important projects will leave you feeling energized by your progress.

❑ Reenter Life

A key element of the Strategic Planning Retreat is not to leave the session and forget about it until the next session. Review the goals you set, at least weekly, to make sure you're staying on track with the priorities you set for yourself.

Look at your project's lists and the next actions you identified to know what the next step is on that project. Any time you've finished a task, mark it off and replace it with the next action that will need to be taken. This helps to ensure you always know how to pick back up with a project.