

## Chapter 13

# Strategic Planning





# Strategic Planning Workbook

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## **Introduction**

Strategic Planning is a necessary part of every organization, whether it is business, government, or an association. Without proper planning, a Chamber can lose its focus and direction resulting in ineffective operation, poor consumer awareness, and — even worse — collapse.

This booklet focuses on the strategic planning process that has been effective when dealing with the organization and operation of a Chamber of Commerce. It does not contain the answers; it merely gives a set of parameters around which a hard-working, committed group of individuals can discuss and develop the action plan that best suits their Chamber and their community.

Therefore, active participation is not only recommended, it is crucial to the proper process of plan development. No question is irrelevant and no answer is either “right” or “wrong”. It is your Chamber and your community, and through this process you will be able to determine your Chamber’s “right” answers; ones that will be unique to your environment.

And remember, the strategic planning process is a dynamic one; your plan, once completed, should be reviewed and updated on a regular basis (bi-annually or annually) in order to maintain the necessary focus essential to your Chamber’s effectiveness and success.

## **Purpose**

A good strategic plan will accomplish the following:

1. Lay out your ideas;
2. Demonstrate you know what you’re doing;
3. Become a sales tool;
4. Prove the feasibility of your Chamber; and,
5. Will be used as a roadmap for volunteers and staff.

# STRATEGIC PLANNING PROCESS

To clarify the terminology used and to help focus discussions, the following definitions are offered.

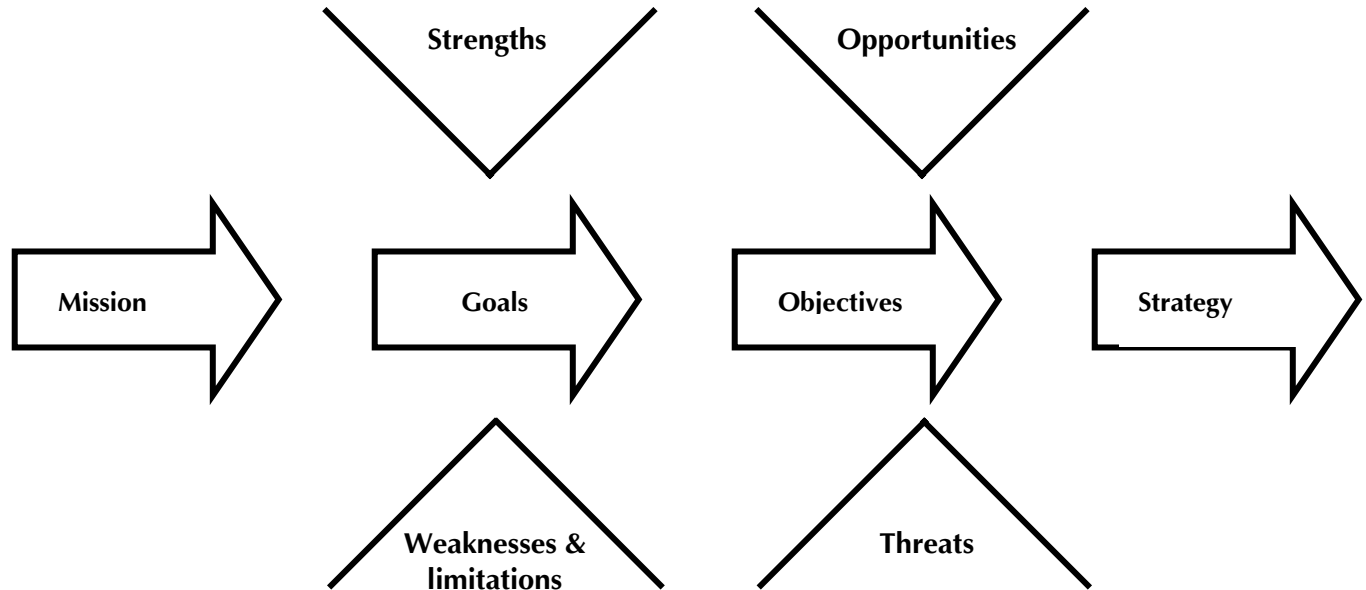
**Goals**  
Measurable targets and end results that the Chamber is striving to achieve

**Critical Success Factors**  
Key requirements for the achievement of stated objectives

**Opportunities**  
Attractive possibilities for long-term growth and development of the Chamber

**Objectives**  
Specific annual measurable targets that achieve the goals that are identified

**Mission**  
The Chamber's **core competency** – who you are, what you do and for whom



**Strengths**  
Assets and resources the Chamber can capitalize on in the pursuit of its goals

**Weaknesses/limitations**  
Internal constraints or difficulties to be addressed

**Threats**  
Overriding external concerns requiring resolution or attention

**Strategy**  
An integrated set of actions directed towards the achievement of long-term goals

# MISSION STATEMENT



The mission statement is the prime directive that your Chamber will follow – your core competency. It should be simple, direct, and easy to remember as it will be the phrase that your community associates with your Chamber's operations. Each event or activity proposed by your Chamber should be a mission statement "fit" or at the very least, be able to "live beside" your mission statement.

Proposed:

Draft Work:

**Final Mission Statement:**

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# SWOT Analysis



|                             |                          |
|-----------------------------|--------------------------|
| <p><b>Strengths</b></p>     | <p><b>Weaknesses</b></p> |
| <p><b>Opportunities</b></p> | <p><b>Threats</b></p>    |

# GOALS



As previously defined, a goal is a measurable target that the Chamber is trying to achieve. An example of a goal is simply "increase membership." The following section will allow you to identify the goals of your Chamber. Extra space is included — as often in goal determination, additional strategies and objectives are discovered. Write them down as you think of them, as they can sometimes be forgotten.

1. **Goal** —

a)

b)

c)

2. **Goal** —

a)

b)

c)

3. **Goal** —

a)

b)

c)

4. **Goal** —

a)

b)

c)

**Ensure the goals are measurable and achievable and do not drain your resources.**

5. **Goal** —

a)

b)

c)

6. **Goal** —

a)

b)

c)

7. **Goal** —

a)

b)

c)

8. **Goal** —

a)

b)

c)

9. **Goal** —

a)

b)

c)

10. **Goal** —

a)

b)

c)



# OBJECTIVES & STRATEGIES



Now that your goals have been identified, it is important to determine the objectives necessary to reach these goals, as well as the strategies used to achieve the objectives. Often strategies can overlap to achieve related objectives. Again, this is a workbook; write everything down.

## Goal 1

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

## Goal 2

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

## Goal 3

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

**Goal 4**

| <b>Objectives</b> | <b>Strategies</b> |
|-------------------|-------------------|
| a)                |                   |
| b)                |                   |
| c)                |                   |
| d)                |                   |

**Goal 5**

| <b>Objectives</b> | <b>Strategies</b> |
|-------------------|-------------------|
| a)                |                   |
| b)                |                   |
| c)                |                   |
| d)                |                   |

**Goal 6**

| <b>Objectives</b> | <b>Strategies</b> |
|-------------------|-------------------|
| a)                |                   |
| b)                |                   |
| c)                |                   |
| d)                |                   |

**Goal 7**

| <b>Objectives</b> | <b>Strategies</b> |
|-------------------|-------------------|
| a)                |                   |
| b)                |                   |
| c)                |                   |
| d)                |                   |

**Goal 8**

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

**Goal 9**

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

**Goal 10**

| Objectives | Strategies |
|------------|------------|
| a)         |            |
| b)         |            |
| c)         |            |
| d)         |            |

# ORGANIZATIONAL STRUCTURE



**Membership**

**Board of Directors**  
Consisting of: President, Vice President(s) Treasurer,  
and Directors  
per your bylaws

**Staff**

**Committee**  
Focus:  
Chair:  
Members:

**Committee**  
Focus:  
Chair:  
Members:

**Committee**  
Focus:  
Chair:  
Members:

**Committee**  
Focus:  
Chair:  
Members:

**Committee**  
Focus:  
Chair:  
Members:

**Committees are unique to your community but usually incorporate membership, education, government affairs, and economic development**

**Work Page**

