

Strategic Planning Primer

A pre-planning workbook for business and organizational leaders by ENVIVE Solutions and CrestLeaders



Strategic prompts, tools, and reflections to help you plan for what's next.





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"Clarity before planning is power." — adapted from Peter Drucker

Before your organization enters a formal strategic planning process, it's essential to pause and reflect on the deeper "why" and "what" behind your work. This primer helps you define your **motivation, values, vision, and early goals** so that when you engage in planning — whether with a consultant, board, or team — your direction is grounded, authentic, and clear.



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1. Clarify Your Motivation: Your “Why”

Purpose: Define the deeper reason your organization exists beyond day-to-day operations. This will later inform your mission and strategic priorities.

Guiding Questions

- Why did I start (or lead) this business or organization?
- What problem, need, or opportunity am I passionate about addressing?
- Who do we serve — and why is that important to me personally and professionally?
- What kind of long-term impact do I hope we’ll have on people, systems, or communities?

 Draft a simple Purpose Statement to bring to your strategic planning process.

Example: “We exist to strengthen organizations and leaders who serve communities in need.”

My Purpose Statement:



2. Identify Core Values — Your Compass for Decisions

Purpose: Values set the tone for your culture and guide decisions when strategy gets complex. They also help ensure your future goals stay aligned with your ethics and intent.

Guiding Questions

- What principles define how we operate and make decisions?
- What behaviors reflect our best work as a team or organization?
- Which values are non-negotiable?
- Which values should be strengthened to support our future growth?

 List your top 3 to 5 core values and what they look like in action.

Value	What It Looks Like in Action
1.	
2.	
3.	
4.	
5.	

These values will serve as a foundation when establishing guiding principles and decision filters during your strategic planning process.



3. Define Vision and Mission — Your North Star

Purpose: Your *vision* describes your desired future state; your *mission* clarifies how you'll get there. Even if you refine them later with your team, start now by articulating your initial sense of direction.

Guiding Questions

- What would success look like 5 to 10 years from now if everything went right?
- What difference will our organization make for the people or systems we serve?
- What is our core work — the “how” behind our purpose?

 Draft working statements to bring to your planning session.

Vision (Future State)

Example: “Communities where all individuals can access equitable, compassionate care.”

My Vision:

Mission (What We Do to Achieve It)

Example: “We partner with organizations to strengthen leadership, systems, and outcomes in behavioral health.”

My Mission:



4. Explore Early Strategic Goals — Setting Direction, Not Yet Strategy

Purpose: You're not setting your full strategic plan yet — you're identifying **priority focus areas** that will guide that conversation later.

Guiding Questions

- What are the most pressing challenges or opportunities we face right now?
- Where do we want to see meaningful progress in the next 12 to 24 months?
- What long-term outcomes or impacts do we hope to achieve?

 List 2 to 4 broad goals or focus areas that could later shape your strategic plan.

Focus Area / Goal	Why It Matters	Potential Measures or Milestones
1.		
2.		
3.		
4.		

In your strategic planning process, these can evolve into formal objectives, strategies, and key performance indicators (KPIs).



5. Reflect on Alignment — Preparing for Strategic Discussion

Purpose: Alignment ensures your leadership team, contractors, or collaborators share a common understanding before the planning process begins.

Guiding Questions

- Where is there strong alignment in our organization (values, priorities, direction)?
- Where do perspectives differ or need conversation?
- What assumptions do I hold that might need to be re-examined?
- How ready are we (as individuals and as a team) to make intentional, strategic choices?

 Jot down notes or insights to raise during the planning session.



6. Common Pitfalls and Mindset Shifts When Entering Planning

Pitfall	Shift in Thinking
Starting the process without clear purpose	Clarify “why” first; strategy follows meaning.
Expecting immediate consensus	Allow time for dialogue and alignment.
Treating the plan as a static document	Strategy is a living framework for decision-making.
Skipping values and vision	These define the boundaries of all future goals.

 Write down any additional pitfalls you may be experiencing and how you can change your thinking about them.



7. Tools and Resources to Help You Prepare

See appendices E through I, pages 17-21.

- [Golden Circle Worksheet](#): Explore your “Why / How / What”
- [Business Model Canvas](#): Visualize your value creation process
- [Organizational Readiness Checklist](#): Assess strengths before entering planning
- [SMART \(Specific, Measurable, Achievable, Relevant, Time-bound\) Goals Framework](#): Structure objectives that flow from your mission
- [SWOT \(Strengths, Weaknesses, Opportunities, Threats\) Analysis](#): Identify key internal/external factors to bring into planning



8. Reflection Summary

 In one short paragraph, summarize where your organization stands and what you most want from the upcoming strategic planning process.

Tip: Bring this completed primer to your strategic planning session. It will help your facilitator or team quickly understand your perspective, priorities, and desired outcomes — saving time and ensuring that the formal process starts with clarity and shared understanding.

Closing Note

Alignment isn't a one-time event — it's an ongoing practice. Strategic planning succeeds when your purpose, structure, and agreements support not just what you do, but *how you do it* and *who you become together* in the process.

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Appendices

Integrating Values, Well-Being, and Leadership Alignment into Strategy

“Strategy without alignment to values and capacity is a recipe for burnout, not success.”

— ENVIVE and CrestLeaders

These appendices provide space to reflect on your personal and collective needs as leaders before formal planning begins. They help ensure your organization’s strategy aligns with what truly matters — for you, your co-owners, and your team.

Appendix A: Personal Sustainability and Capacity Notes

A healthy organization depends on healthy leaders. Use this section to record boundaries, rhythms, and personal commitments that keep you resourced, creative, and able to lead.

Examples

- I do my best work when I limit client sessions to 10 per week.
- I need at least one full day each week for creative or strategic thinking.
- My ideal workweek is 30 hours; beyond that I lose clarity and presence.
- I need clear time for exercise, reflection, or family — and that time is non-negotiable.

 Use this space to list your personal sustainability commitments.

Prompts

- What does balance look like for me?
- What routines or boundaries protect my energy and creativity?
- What warning signs tell me I’m overextended?
- How can I design my business model to honor my capacity?

These notes aren’t indulgent — they’re strategic. Sustainable leadership builds sustainable organizations.



Appendix B: Personal Values, Goals, and Alignment

This section helps integrate your **personal purpose** with your **organizational direction**.

Guiding Reflection

- Which of my personal values most influence how I lead?
- Where do my personal goals align with (or differ from) my organization's goals?
- How do I want to evolve as a leader in the next 3 to 5 years?

 Complete the following.

Personal Value or Goal	Connection to Organizational Vision or Strategy
1.	
2.	
3.	
4.	
5.	

When personal and organizational values align, decisions feel clear and integrity stays intact.



Appendix C: Co-Owners / Leadership Team Alignment Worksheet

For organizations with more than one owner or key leader, alignment conversations before strategic planning are essential. Use this section to create clarity around expectations, agreements, and shared values.

Step 1: Shared Purpose

 In one sentence, describe what unites you as co-owners or partners.

Prompts

- What is our shared “why”?
- What are we building together?
- What does success mean to each of us individually and collectively?

Step 2: Ownership and Roles

 Clarify how responsibilities are divided today — and where they may need adjustment.

Function / Domain	Primary Owner	Backup / Collaborator	Notes / Comments
Strategic Direction			
Operations / Systems			
Finance / Budgeting			
Marketing / Communications			
People / Culture			



Function / Domain	Primary Owner	Backup / Collaborator	Notes / Comments
Client Delivery / Programs			

Reflection: Are we each operating in our strengths? Are roles clear and mutually respected?

Step 3: Decision-Making and Communication

Prompts

- How do we make major decisions (consensus, vote, delegation)?
- How do we handle disagreement?
- How will we communicate regularly to stay aligned?
- What processes ensure transparency and accountability?

Summarize agreements here.

Step 4: Agreements as Partners, Owners, and Leaders

Use this page to record shared commitments — the “rules of engagement” for your partnership and leadership culture.

Agreement Area	Shared Understanding / Commitment
Mutual respect and communication	
Transparency and honesty	
Conflict resolution process	
Equity and workload balance	
Financial or ownership principles	



Agreement Area	Shared Understanding / Commitment
Decision-making boundaries	
Personal boundaries (availability, work hours, etc.)	
Leadership development or reflection cadence	

Revisit and refine these agreements at least annually. They form the foundation for trust, accountability, and organizational health.



Appendix D: Reflection Summary for Co-Owners

 As a team, reflect on the following questions before the formal strategic planning process:

- What are we aligned on?
- What do we need to discuss further or clarify?
- How do we want to show up in this next phase — as individuals and as a leadership team?



Appendix E: Golden Circle Worksheet

Purpose: Explore your “Why / How / What” to realign your strategy with your purpose.

Circle	Guiding Prompts	Reflection / Notes
Why	Why do we exist? What core belief or purpose drives us?	
How	How do we fulfill our purpose differently from others?	
What	What programs, services, or outcomes do we deliver?	



Appendix F: Business Model Canvas

Purpose: Visualize your organization's value creation process.

Element	Guiding Questions	Your Notes
Customer Segments	Who are our primary beneficiaries, clients, or audiences?	
Value Proposition	What value do we deliver? What problems do we solve?	
Channels	How do we reach and communicate with our customers?	
Customer Relationships	What kind of relationship do they expect from us?	
Revenue Streams	How do we sustain our work financially?	
Key Resources	What people, systems, or assets are essential?	
Key Activities	What must we do exceptionally well to deliver value?	
Key Partnerships	Who helps us succeed? What collaborations are vital?	
Cost Structure	What are our major costs? Where can we increase efficiency?	



Appendix G: Organizational Readiness Checklist

Purpose: Assess readiness before launching the planning process.

Rate each item as: Yes, In Progress, or No / Needs Attention.

Category	Readiness Question	Status	Notes / Next Steps
Leadership	Is leadership aligned on priorities and purpose?		
Mission & Vision	Are our statements current and clearly understood?		
Data & Insights	Do we have accurate financial, performance, and outcome data?		
Stakeholder Engagement	Are key voices (staff, clients, partners) represented?		
Communication	Do we have effective internal communication systems?		
Resources & Capacity	Do we have time and resources for planning participation?		
Governance & Structure	Are roles and decision-making processes defined?		
Equity & Inclusion	Are DEIBJA principles integrated into our approach?		



Appendix H: SMART Goals Framework

Purpose: Create actionable goals that align with your mission.

SMART Element	Definition	Your Goal / Notes
Specific	Define what you will achieve.	
Measurable	Identify indicators of progress or success.	
Achievable	Ensure the goal is realistic given current capacity.	
Relevant	Align with mission, vision, and organizational priorities.	
Time-bound	Set a clear deadline or timeframe.	

Example:

Goal: Increase cross-team collaboration.

SMART Version: "By June 2026, implement monthly cross-departmental meetings to strengthen communication and shared problem-solving."



Appendix I: SWOT Analysis

Purpose: Identify key internal and external factors to inform planning.

Category	Guiding Prompts	Notes / Insights
Strengths	What do we do best? What unique assets or expertise do we have?	
Weaknesses	What gaps or limitations hold us back?	
Opportunities	What trends or partnerships could we leverage?	
Threats	What risks, competition, or barriers could affect us?	