## Executing Your Strategic Plan

This guide assumes you have already determined the content of your strategic plan.

### PREPARE

**Produce Your Strategic Plan Document**
- Create a 1-4 page version that is targeted to your broadest audiences, including potential funders. Details can go in internal, action plans.

**Communicate**
- Develop a communication plan: what messages, to whom, how, when? See *Communication Plan* template (page 2).

### LAUNCH

**Define and Plan Action**
- Create a *Charter* (see page 3) for each major initiative.
- Assign leaders, teams.
- Teams create action plans. See *Action Plan* template (page 4).

**Align Your Resources with Your Priorities**
- Determine what is needed to achieve your priorities: People, funding, equipment, space, training/development.

**Align Subunit Plans**
- If your plan covers multiple units, it may make sense for each unit to develop its own plan in alignment with the larger unit.

### EXECUTE

**Manage Implementation**
- Monitor and report progress
- Highlight successes: stories, photographs, charts, progress reports.

**Sustain Momentum**
- Communication: web, podcasts, talks, publications.
- Web site – link to initiatives, invite interaction, show progress
- Infuse into meeting agendas, hiring decisions, fundraising, etc.
- Recognize, celebrate progress.

### CHECK

**Evaluate and Update**
- Review progress annually (or more frequently). Update plan if needed.
- Officially close out completed projects.
- Recognize, celebrate success.
- Fold “lessons learned” from assessing your accomplishments into the next plan.

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**Want Help?** The Office of Quality Improvement can provide guides and/or assistance with developing, aligning, and executing your plan. [www.quality.wisc.edu](http://www.quality.wisc.edu) or 608-262-6843.
**COMMUNICATION PLAN**

Communications should be timely, complete, accurate and relevant to the audience.

Enter Unit Name Here  
Enter Version Here

<table>
<thead>
<tr>
<th>Audience</th>
<th>Assigned To</th>
<th>Tools / Methods</th>
<th>Timeframe/ Frequency</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>key players &amp; stakeholders; internal &amp; external</td>
<td></td>
<td>networking; presentations; web; print; listening sessions</td>
<td></td>
<td>highlights of the plan; expectations for change; input desired; next steps &amp; milestones</td>
</tr>
</tbody>
</table>

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# Project Charter

Document last updated:

<table>
<thead>
<tr>
<th>Project Title</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority/Initiatives this project addresses</td>
<td></td>
</tr>
<tr>
<td>Sponsor/Decision Maker</td>
<td></td>
</tr>
<tr>
<td>Project Lead</td>
<td></td>
</tr>
<tr>
<td>Key players/Partners</td>
<td></td>
</tr>
<tr>
<td>What do we want to accomplish? Purpose/aim.</td>
<td></td>
</tr>
<tr>
<td>What products are expected? When?</td>
<td></td>
</tr>
<tr>
<td>How will we know we have made progress? (Indicators of Success)</td>
<td></td>
</tr>
</tbody>
</table>

*Note: Adapt this template to fit your needs and terminology.*

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## ACTION PLAN

<table>
<thead>
<tr>
<th>Priority/Initiative:</th>
<th>Indicators of Progress/Success:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action steps</td>
<td>Lead. Others Involved.</td>
</tr>
</tbody>
</table>

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