



SAISON CONSULTING

Strategic Planning

Strategic planning with Saison is an 8-month discernment process expertly facilitated by a team of two consultants. It is designed to help you identify 4-6 priorities that will help your organization thrive in your present season while also preparing for your next.

Our process

A Saison strategic planning process is both structured and adaptable. We take what we have learned through our work with large and small organizations and adapt it to meet your specific needs in your context.

Phase 1 (4 weeks)

PLANNING & PREPARATION

In this preparatory work for strategic planning, we will create a timeline together for your planning process with mutually agreed upon deadlines. We will develop a communication strategy so that key stakeholders will be kept informed throughout the entire process. We will also help you decide whether you want to name a planning committee and if you would like to engage in a quantitative surveying process.

Phase 2 (10–12 weeks)

DISCOVERY

In our discovery work together, Saison will support your leaders as we learn as much as we can from as many people as we can as quickly as we can about your organization, your context, and the wider landscape for your work. By the end of the discovery process, we will note trends and patterns that should shape your strategic vision and the life of your organization for years ahead.

Phase 3 (8–10 weeks)

DISCERNMENT

Your discernment work begins with a facilitated two-day, one-night retreat for the leadership group charged with drafting your strategic direction and identifying your strategic priorities. Once there is meaningful consensus around the strategic direction and congregational priorities, each priority will be handed off to appropriate teams for the development of benchmark goals, metrics, and timelines for that priority. By empowering relevant teams to draft their own goals, you are securing buy-in and harnessing the creative capacity of the entire organization.

Phase 4 (ongoing)

IMPLEMENTATION

Saison's work with your organization does not end when your strategic plan is drafted. There is a significant final phase of the planning process—alignment and implementation. In this phase, we develop the kind of project management systems and accountability structures that will enable your success as you move forward with your plan.

OUR TIME TOGETHER: APPROX. 8 MONTHS

Laying the foundation

In advance of our work together, you should:

- Convene conversations with stakeholders to discuss the rationale for and the importance of this process (engaging in this work shouldn't be a surprise to anyone)
- Provide your consulting team with meaningful data about your organization, including organizational history, leadership structure, stakeholder demographics, past strategic plans, and recent financial reports
- Receive approval for the costs of this process

Our work together

During our work together, you should expect to:

- Engage in a robust discovery process in which you will learn about your organization and the landscape for your work using both qualitative and quantitative measurements
- Appraise your organizational strengths and challenges in a hopeful and forward-looking way
- Discern 2–3 internal strategic priorities for your organization and 2–3 outward-facing strategic priorities
- Empower your internal leadership to develop appropriate goals, metrics or measures, and benchmarks within each strategic priority
- Communicate with key constituencies and stakeholders regularly about the status of the project
- Meet with your consulting team every other week, if not more frequently
- Dedicate at least 5 hours per week to this process
- Find renewed energy and excitement within your organization for your work

Process outcomes

As a result of our work together, you will be able to:

- Describe your mission, vision, and values in compelling and contextually-appropriate ways
- Lead from shared strategic priorities
- Evaluate your work against your strategic priorities
- Enjoy strategic alignment within your staff and organization
- Embed your vision in the life of your organization

Investment

For any organization, a strategic planning process represents a significant investment of money and time. **At Saison, we honor that investment by working as efficiently and collaboratively as possible.** Throughout the process, we will offer options and recommendations about how the work might proceed based on your budget, and together, we will make decisions that honor the work and respect your parameters.



For this season. For every season.

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