The Business Planning Process

Question Worksheet

This worksheet offers questions that are helpful in the various aspects of business planning. You can adapt the questions to meet your needs and record your answers all in one document.

# Strategic Clarity

Who or what are we ultimately trying to serve?

What are the specific outcomes for which we want to be held accountable?

What activities must we undertake to achieve concrete, measurable results?

How does our specific portfolio of programs and services lead to change?

# Strategic Priorities

How well does each of our current programs or activities align with our mission and intended impact?

What are our full costs, both direct and indirect, for operating each program?

What is our cost per outcome or positive result?

Do all of our activities complement our core capabilities and expertise, or are we stretched too thin across different services?

How well do we perform compared to our peers?

Are there services we should modify or add to maximize impact?

# Resource Implications

## Financial

Can we manage the budget required by the human resource and infrastructure investments?

How will the increased budget affect our organization’s culture?

How will the new costs affect our cost per outcome?

How is the funding community likely to respond to the spending plan? Can we raise the money we need?

## Human Resources

Do we have the right organizational structure in place to implement the plan?

Does our existing staff have the skills and expertise to execute our strategic priorities?

If so, how much capacity does our current staff have to take on new work? Do we need to add positions, or scale back our goals?

If not, what roles do we need to create? And where will we find the right people to fill these roles?

How soon do we need to bring new people on board? What’s a realistic timeline given our culture and ability to raise funds?

## Infrastructure

How much staff and client growth can our current office and program space accommodate?

What new or improved systems do we need to do our work more effectively (e.g. IT, performance measurement, financial)?

What human resource systems should we put in place to manage our organization (recruiting, orientation, training, evaluation)?

# Performance Measures

What milestones will be most helpful for us to measure?

Do we have the resources in place to efficiently monitor these milestones?

How often will we check‐in on progress and in what way?

# Other Questions

Are we prepared to tackle tough questions and, if necessary, make the trade‐offs that flow from answers to these questions?

Can we devote sufficient time and energy to make the business‐planning process worthwhile?

Who will we involve in the process, and what will be expected from them?

How will we solicit input from others and communicate progress?