



## Fundamental Questions to Ask

- Where are we now? (Honest Assessment)
- Are their histories? (Amnesty/Atonement)
- Where do we need to be? (Desired Outcome)
- How will we close the gap? (Action Plan)
- Who benefits? (Stakeholder Engagement)
- What are the fiscal realities? (Money Talks)
- How will we monitor our progress? (Scorecard)

## It is imperative that we . . .

- Address critical performance issues
- Create the proper balance between what the institution is capable of doing vs. what the institution would like to do
- Cover a sufficient time period to close the performance gap
- Be visionary – convey a desired future end state
- Be flexible – allow and accommodate change
- Guide decision making at lower levels – operational, tactical, individual
- Clearly define the complete strategic goal setting process
- Execute a “ONE-PAGE” plan that the entire institution can follow

## Assessment Model: S W O T

**Internal Assessment:**  
Organizational assets, resources, people, culture, systems, partnerships, suppliers, . . .

**External Assessment:**  
Marketplace, competitor's, social trends, technology, regulatory environment, economic cycles .

