

WHAT IS STRATEGIC PLANNING?

Strategic planning is a structured process that transforms organizational vision into actionable goals and measurable outcomes. When done well, your strategic plan becomes a **roadmap for organizational direction**, leading you to **success and sustainability**.

WHO NEEDS A STRATEGIC PLAN?

- **Nonprofits** seeking sustainable growth, facing funding changes, or exploring new offerings.
- **Small businesses** ready to scale.
- **Startups** moving past initial success to structured growth.
- **Schools and learning institutions** adapting to changing education landscapes.
- **Religious organizations** seeking to define or refine their purpose and programming
- **Social enterprises** needing to balance mission and sustainability.
- **You.** You need a strategic plan!

"I want to thank you for all of your intentional and truly gifted hard work over the last 6 months with our organization. You have shown me grace, professionalism, support, and encouragement, and most importantly you used your skills and wisdom to help me create a pathway for taking my small family-founded org to a scaling, successful, and sustainable organization. The magic you sprinkle on orgs like mine is unparalleled. Thank you! Thank you! Thank you! Thank you for believing in me and my vision enough to create the masterpiece that you did for us!"

Nonprofit CEO, Texas

THE LIFTED DIFFERENCE

We deliver meaningful results through genuine **partnership**. Our clients consistently highlight two distinctive elements: our ability to balance

analytical rigor with practical implementation and our talent for **unlocking organizational potential** while maintaining an unwavering focus on **mission impact**. From established nonprofits seeking to identify and leverage new opportunities for deepening impact to family-founded organizations ready to scale, we create **tailored pathways to sustainable success**. We do this through **data-driven decision-making, a stakeholder-centric approach, measurable outcomes, and immersive engagement**.

STRATEGIC PLANNING SERVICES

STRATEGIC PLANNING SUPPORT

- **STRATEGIC PLAN COACHING.** SUPPORT AND COACHING FOR DO-IT-YOURSELF STRATEGIC PLANNING.
- **STRATEGIC ALIGNMENT WORKSHOPS.** BOARD AND STAFF WORKSHOPS FOR ALIGNING ON STRATEGIC PLANNING GOALS, PRIORITIES, AND PROCESSES.
- **STRATEGIC PLAN STEPBACK.** COMPREHENSIVE REVIEW OF YOUR EXISTING STRATEGIC PLAN, PROGRESS TO DATE, AND PLANNING NEXT STEPS.

STRATEGIC PLANNING PACKAGES

- **STRATEGIC PLAN REVIEW AND ACTION PLANNING.** REVIEW AND SUMMARIZATION OF EXISTING STRATEGIC PLAN AND CREATION OF A COMPREHENSIVE ACTION PLAN STRATEGY DEVELOPMENT.
- **STRATEGY DEVELOPMENT.** DEVELOPMENT OF A COMPREHENSIVE STRATEGY IN A SINGLE FOCUS AREA.
- **STRATEGIC PLANNING.** DEVELOPMENT OF 3-5 STRATEGIC YEAR PLAN THAT POSITIONS THE ORGANIZATION FOR MAXIMUM IMPACT AND OUTCOMES.

