

DEFINITIONS OF STRATEGIC AND TACTICAL PLANNING

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STRATEGIC PLANNING

Strategic Planning is a process by which the leadership of an organization positions or repositions the system in its social context, defines its essential purposes, identifies its priorities, describes its vision of success, makes explicit the values by which it operates, and specifies its strategic goals for the purpose of aligning its resources and optimizing its potential.

Some strategic goals may never be achieved; the system will always be striving to pursue them. Organizational statements of mission, vision, and values are examples of strategic goals that set direction, determine priorities, and declare criteria for success, but cannot be explicitly measured and may never be completely fulfilled. Other strategic goals, set standards and priorities for the system and define boundaries between acceptable and unacceptable performance. These goals may be measurable in general terms such as “long-term goals” or “annual goals.” Strategic goals are written in general terms and are far-reaching in their scope; their language, typically, is abstract, global, challenging, and often inspiring.

TACTICAL PLANNING

Tactical Planning is the process by which the leaders and members of an organization identify the objectives that must be achieved to fulfill the strategic plans of the system. Tactical planning involves specifying objectives and action plans in time-frames that fit within and support the overall schedule of strategic goal achievement. In general, the time-frame within which to specify “Objectives” is from the present to 3 years out into the future; the time-frame for “Action Plans” is from the present to 12 months out.

Objectives are written in clear language that describes and defines outcomes that are to be achieved, the conditions under which they are to be achieved (e.g. who is to be involved, using what resources, where and when the outcomes are to occur, etc.), and the criteria by which success is to be determined (completion dates, quantities and/or qualities to be achieved, requirements fulfilled, standards met, mandates fulfilled, etc.).

Action Plans are often written in the past tense as if they were already completed, and they are associated with measurements such as deadlines met, quantities produced, percentages gained, documents completed, and other such criteria. (e.g. Invitation letter written by Joe and mailed on Friday.) Action plans describe the specific steps that will be used to achieve an objective, specifies exactly what is to be done, by whom, and when it is to be completed.

In sum: Strategy sets direction; tactics implement.