

Dynamic Strategic Planning

By Kim Krebs and Ed Bronsdon

Session Presenters



Ed Bronsdon
Bronsdon for Good



Kim Krebs
Kim Krebs Consulting

Learning Objectives

1

Provide the basics of best practices for strategic planning.

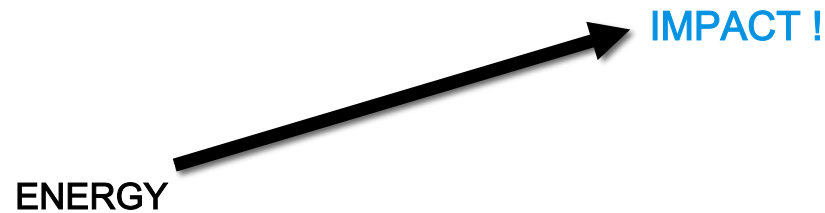
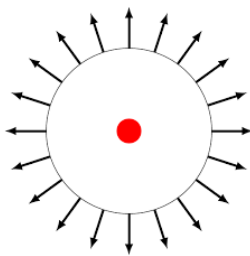
2

Review and showcase the steps in a strategic planning cycle.

3

Develop a segment of a sample strategic plan using tools from the session.

Why Strategic Alignment Important?



- Provides focus, synergy, and direction which results in engagement, commitment and success.
- Forces us to grapple with real trade-offs and make tough decisions rather than making a millimeter of progress in a million directions.
- “Will this activity or effort make the highest possible contribution to our goal?” If not – start eliminating those options.
- Options vs Actions - our options may be various things, but a choice is an action.
- Strategy is about deliberately choosing to be different than we are right now and different from other organizations.



Strategic Planning Purpose

- The goal of strategic planning is to set clear and measurable objectives to strive for with the understanding that KPI results may shift priorities
- Strategic planning is a cycle, dynamic and on-going
- Strategic planning is connected to your organization's lifecycle stage. Depending on what stage you are in impacts where you need to start, focus and how much time it will take.
- Parts of the strategic planning process requires board input and participation, but others are operational and should be defined by the leadership team and staff.

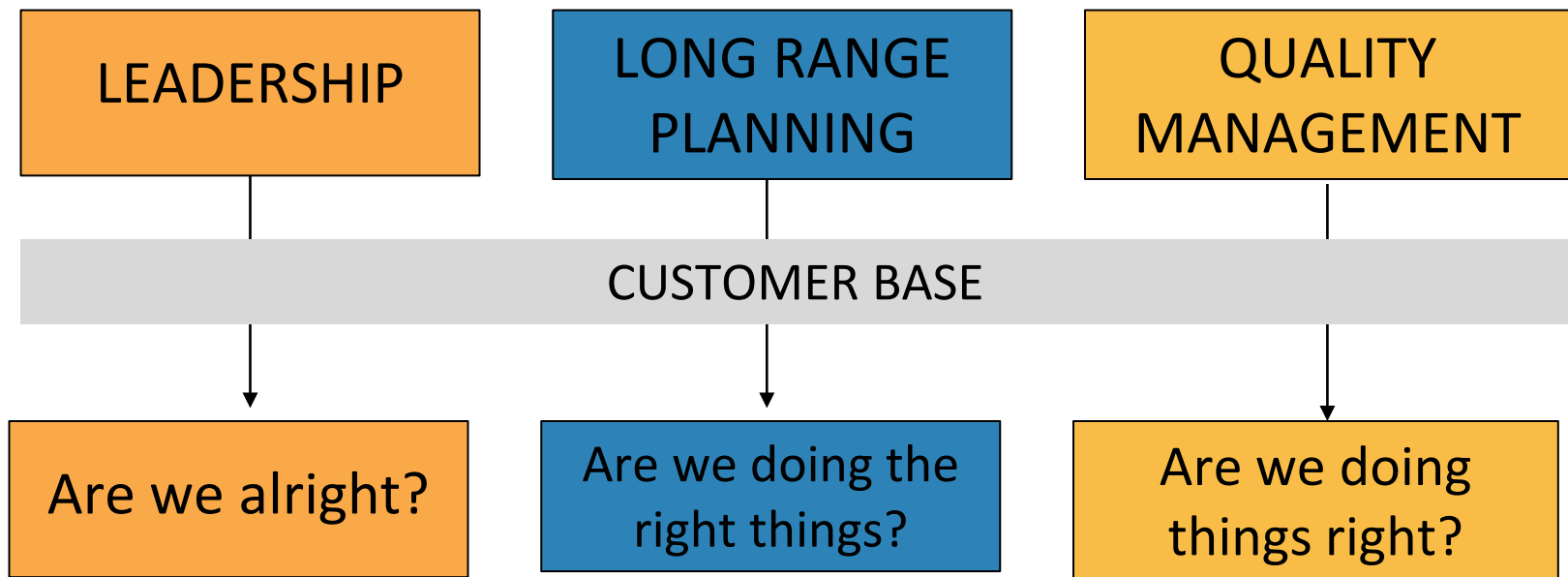
Strategic Planning Process

MODELS AND DEFINITIONS

A solid blue horizontal bar spanning the width of the slide at the bottom.



Organizational Foundations for Strategic Development

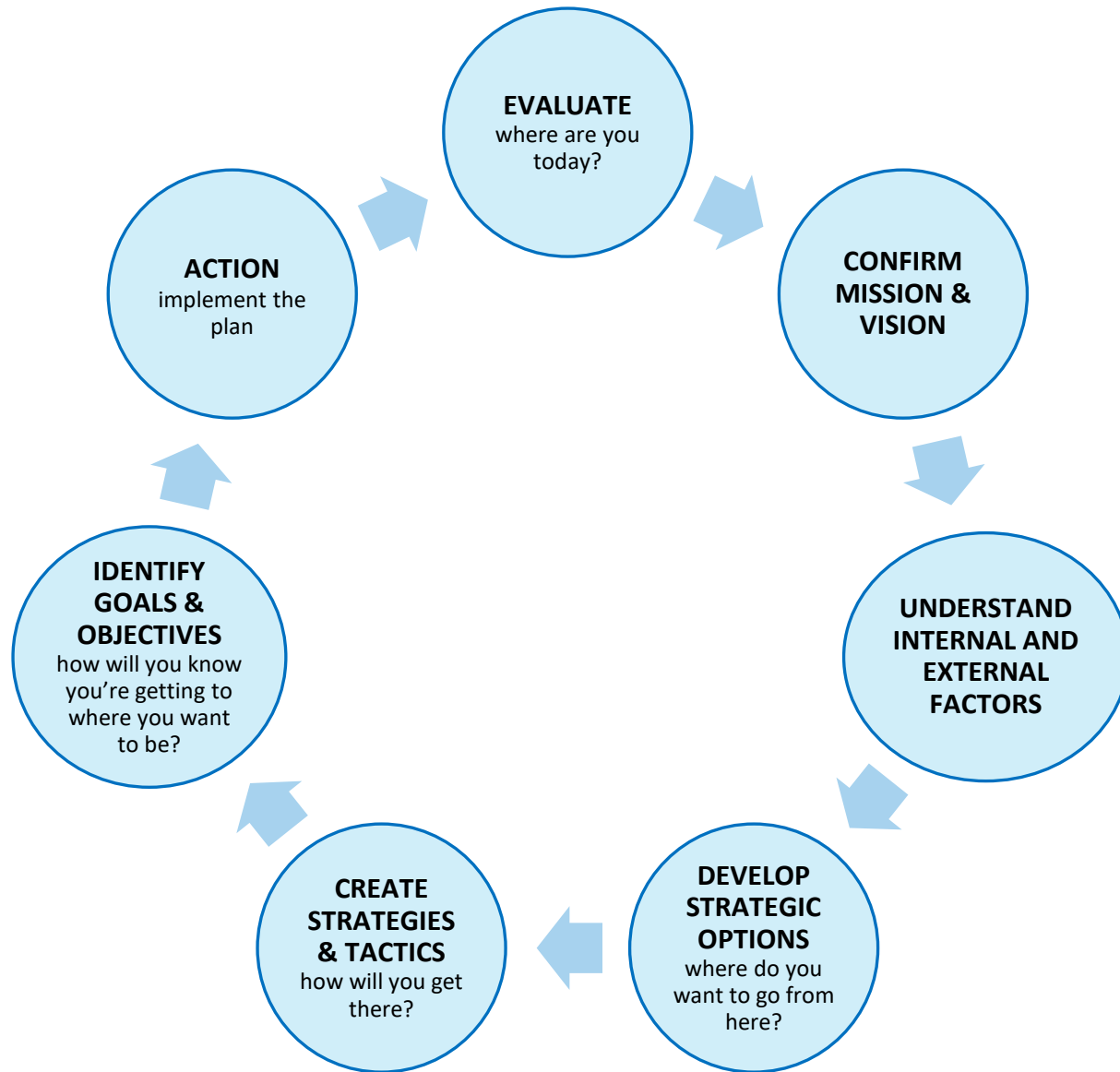


First confront the brutal facts (but never lose faith)

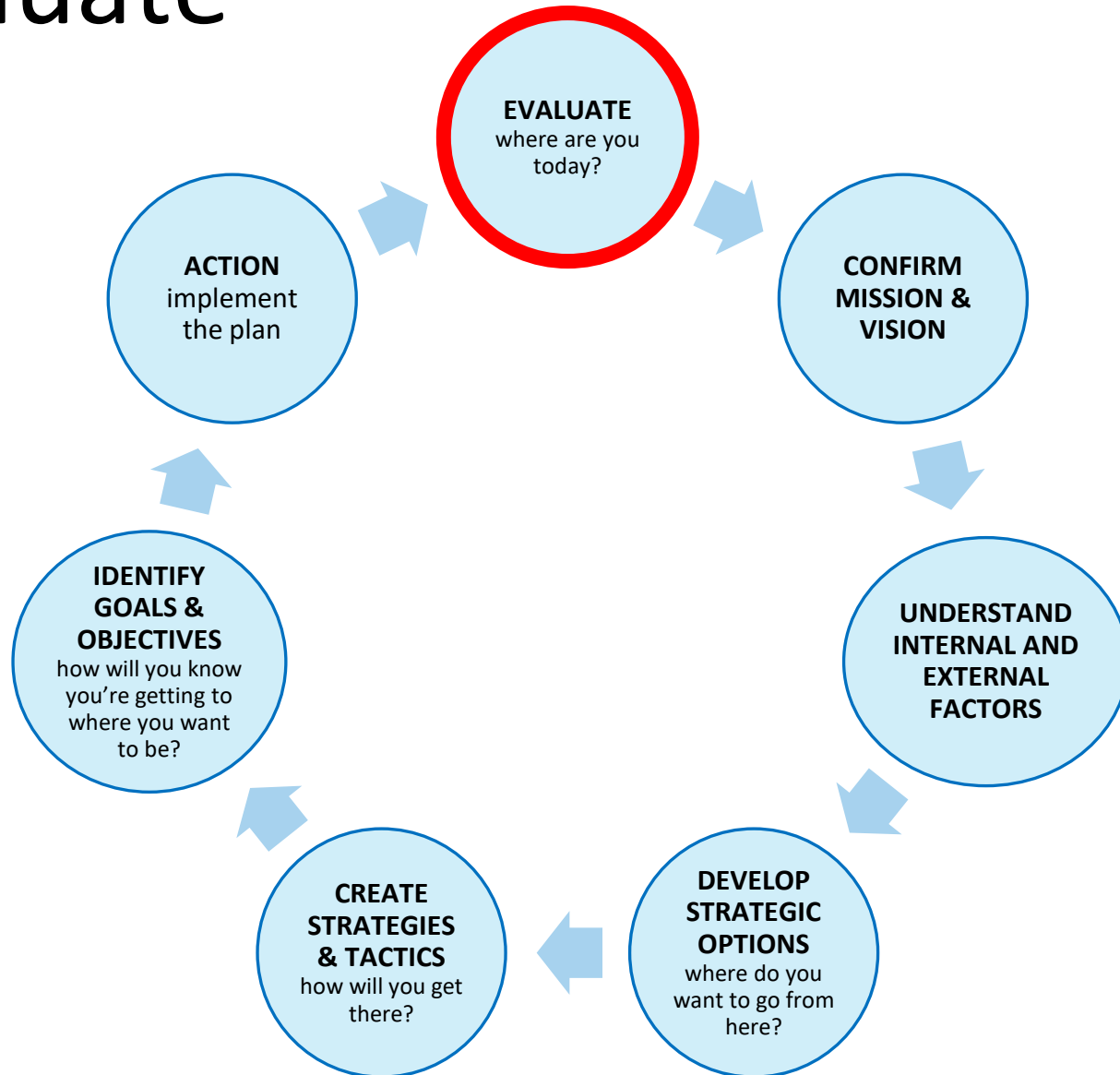
– Jim Collins “Good to Great”



Strategic Planning Process Cycle



Evaluate



Evaluate

- This step will be highly influenced by what lifecycle stage your organization is in at the time of the strategic planning process.
 - A growth or mature stage organization will have data and policies to review and revise.
 - A start-up stage organization will have to be visionary and aspirational in this process, later to be reviewed and evaluated with data and lived experience.
- Collect and synthesize all types of organizational data that you have access to and/or design processes to collect additional data as needed.
 - Staff and Board retreats
 - Client and Volunteer feedback options
 - Partner feedback and input



Six Questions

1. Why do we exist?

This question will yield a core purpose, or the fundamental reason the organization is in business.

2. How do we behave?

This question examines behaviors and values required for success.

3. What do we do?

This answer provides a simple, direct explanation of the organization.

4. How will we succeed?

This question requires the team members to develop a strategy.

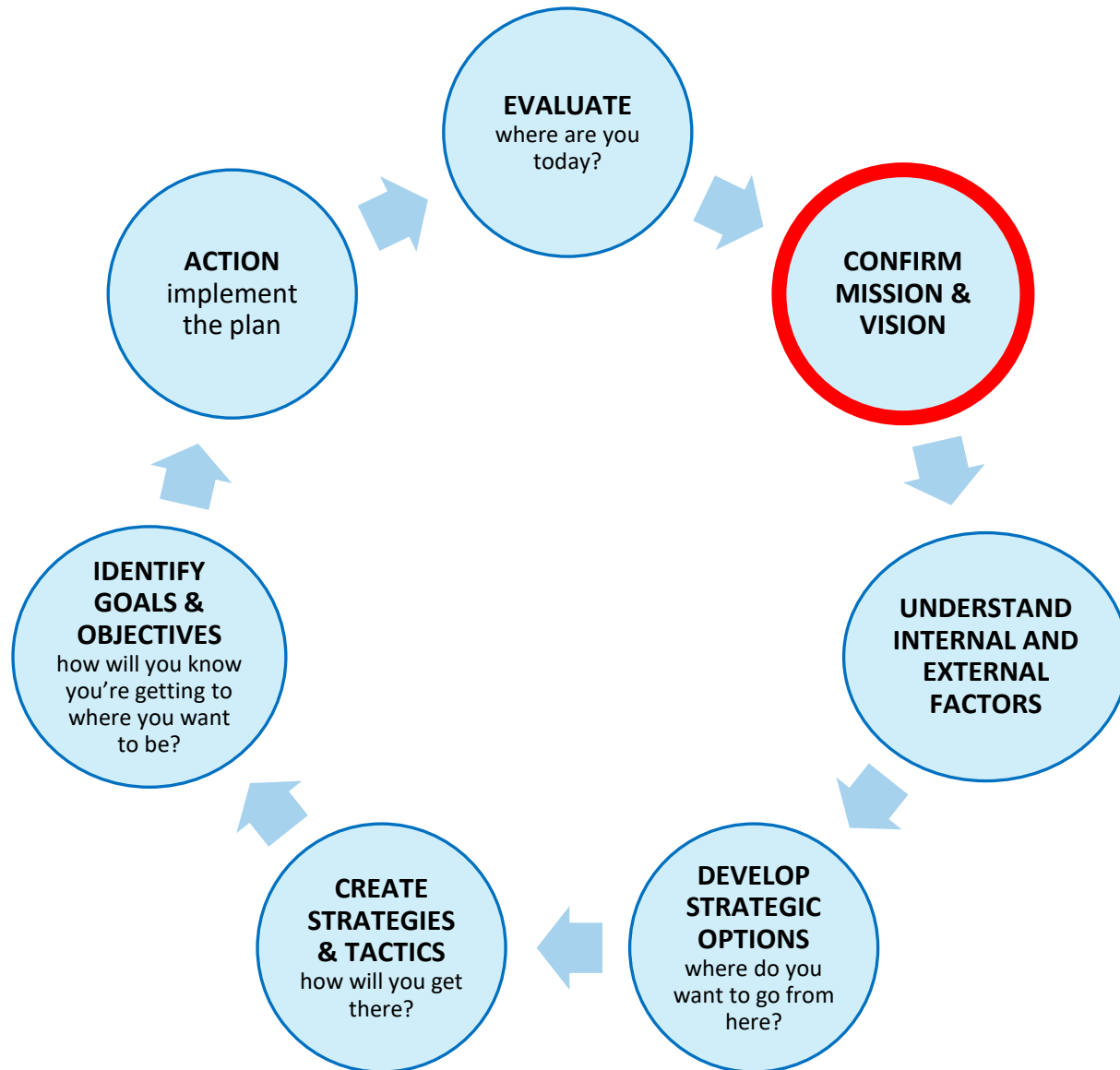
5. What is most important, right now?

The answer to this question is the establishment of a unifying thematic goal and action plan.

6. Who must do what?

This question addresses roles and responsibilities.

Confirm Mission & Vision

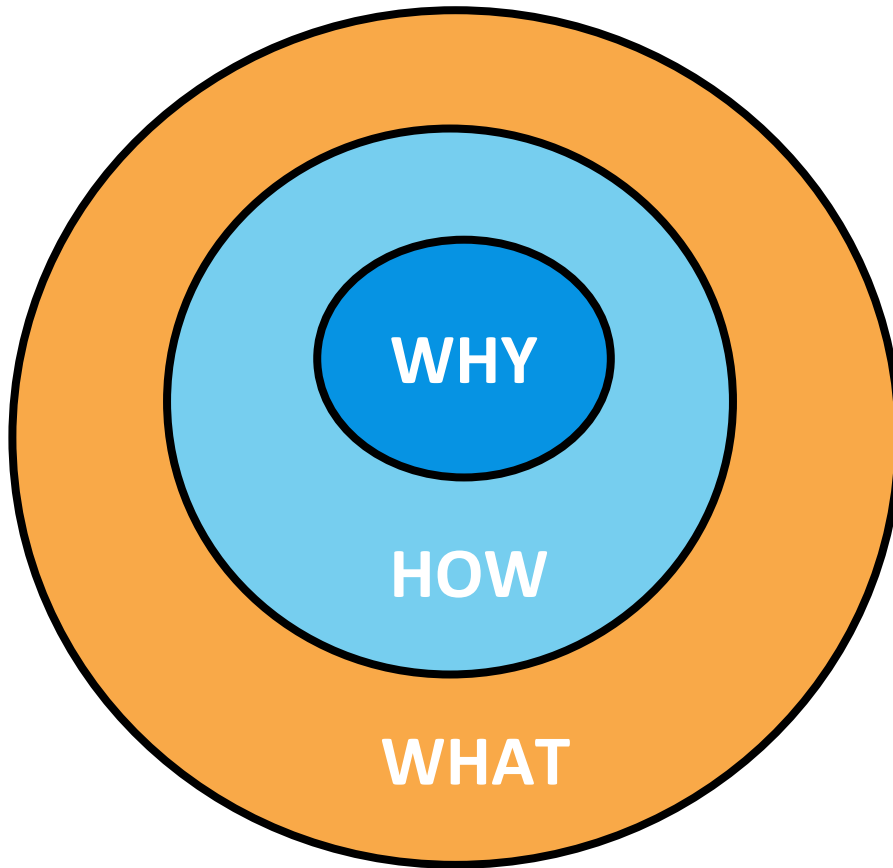




Confirm Mission & Vision

- Does your organization have a clear and specific purpose?
- Do all stakeholders have clarity on mission and vision?
- Do you need to update or revise your mission and vision statements?
- Can you and your stakeholders share the organization's purpose (brand) clearly, consistently and concisely?
- Are your organizational core values and operating principles (belief statements) true and driving culture?
- Do your policies, procedures and processes align with all of the above?

Different Ways to Think about Purpose – WHY?

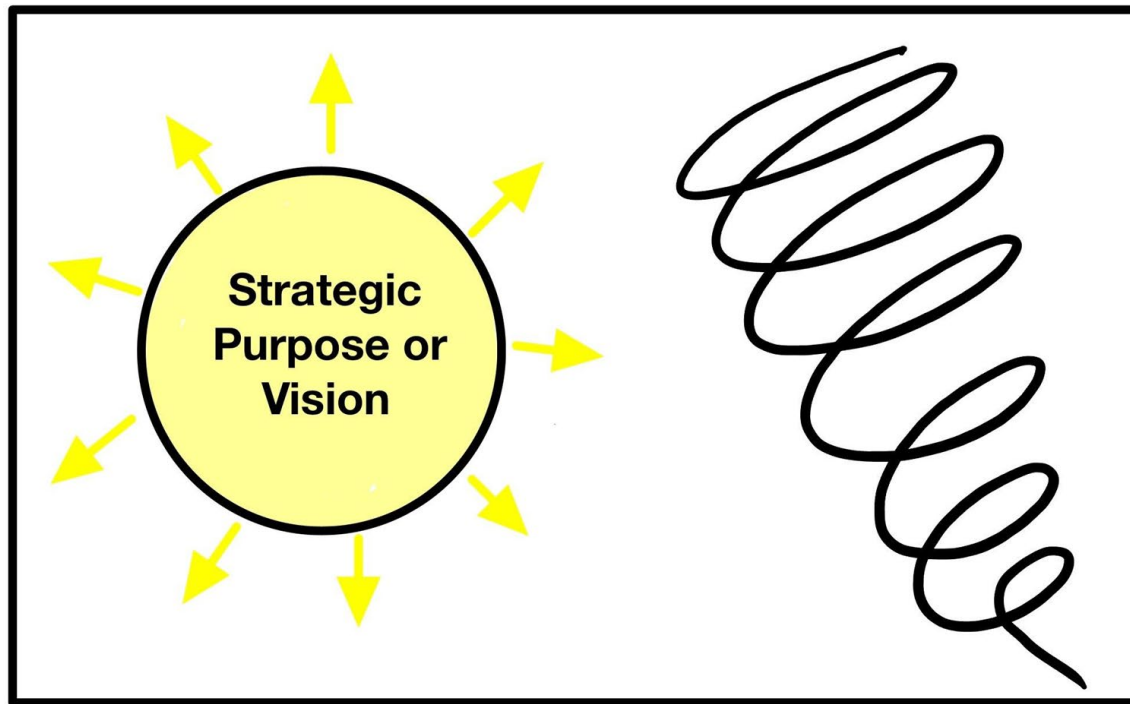


“People don’t
buy what you
do, they buy
why you do it.”

Simon Sinek “Start with WHY”
[TedTalk LINK](#)



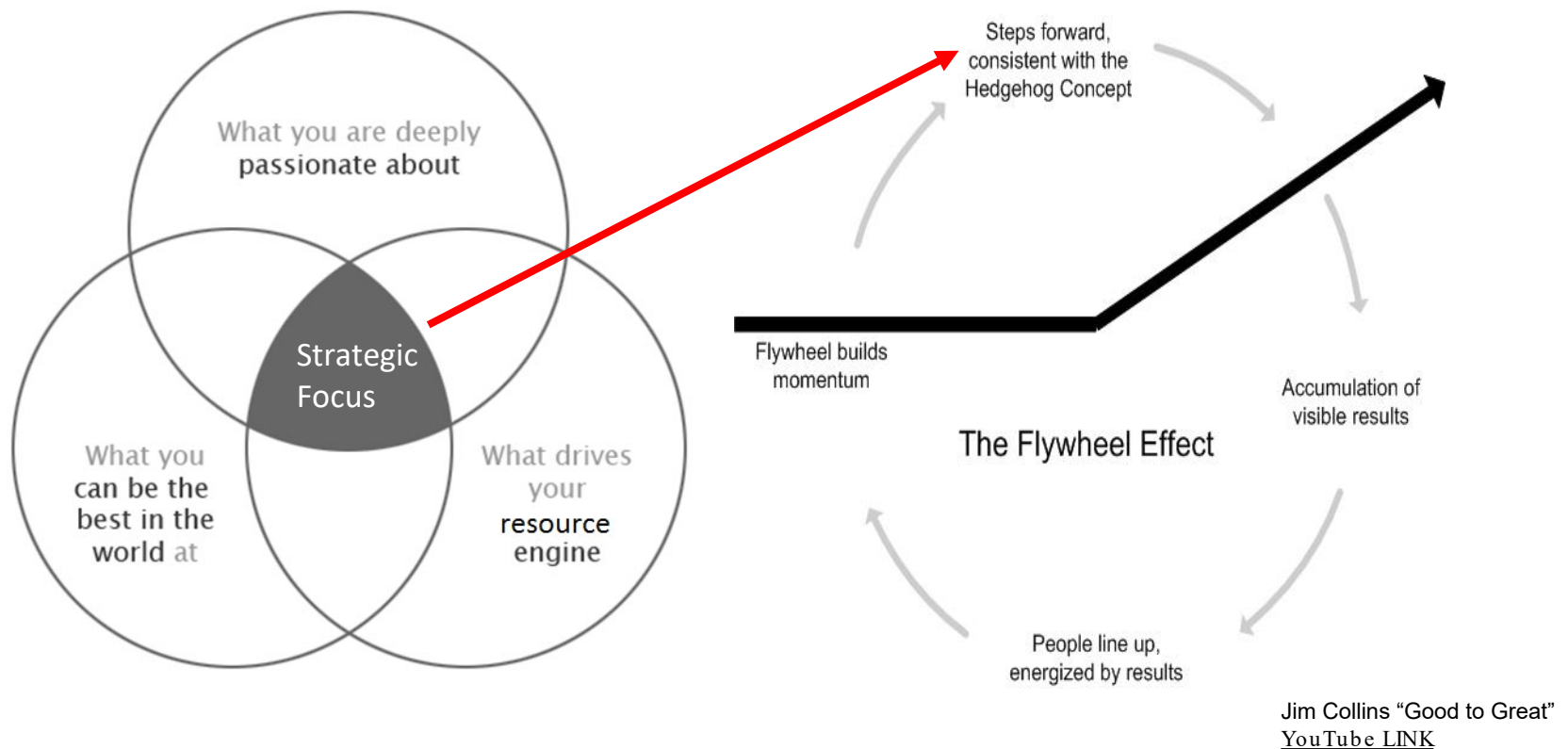
Abundance vs Scarcity Thinking



"Passion, rather than fear, is the igniting force. Abundance, rather than scarcity, is the context"

Benjamin and Rosamund Zander "The Art of Possibility"
[YouTube LINK](#)

Hedgehog Principle



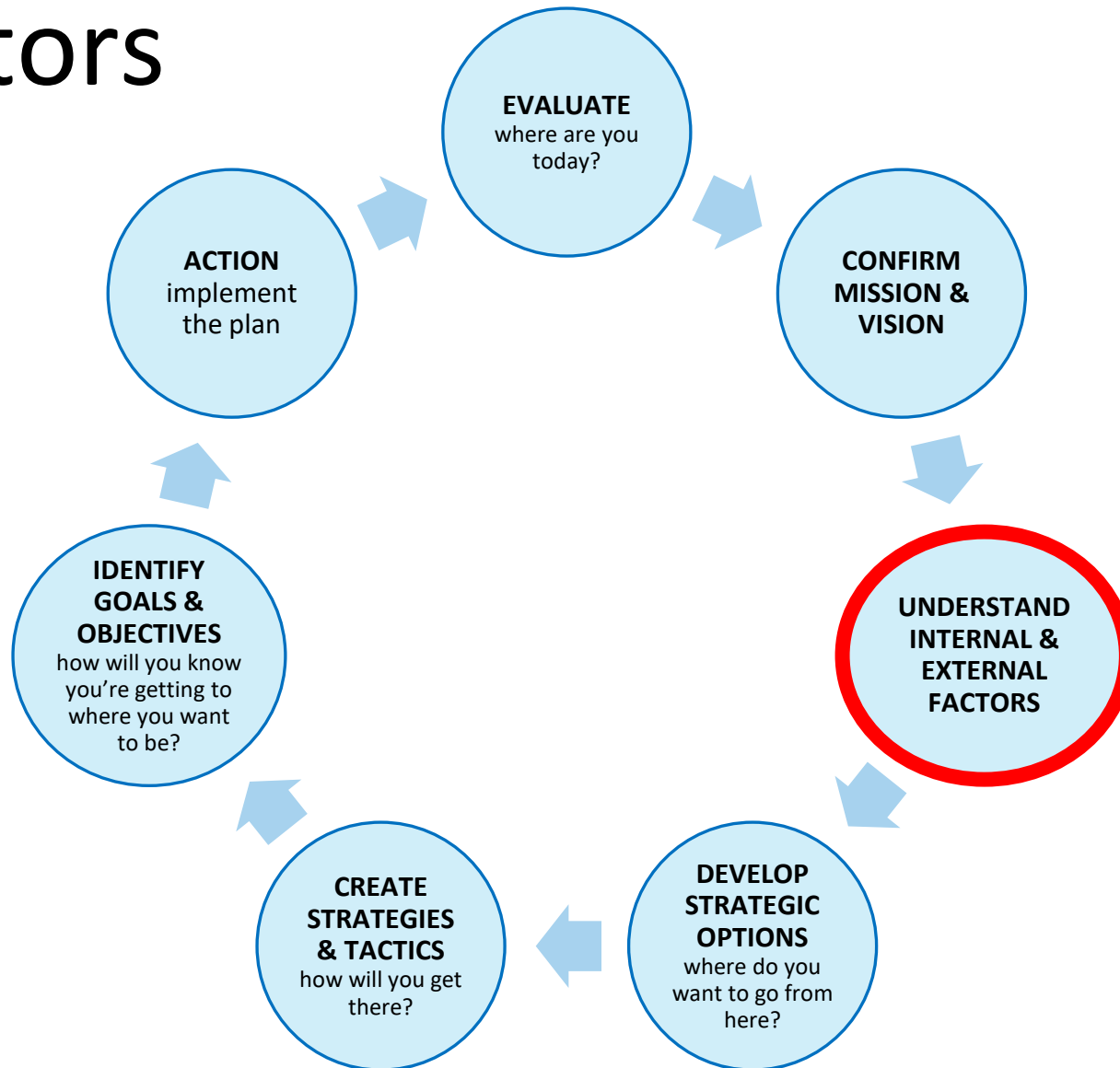
Three- Year- Old Exercise

Identifying your VALUE as an organization begins with having a clear understanding of WHY YOU ARE IMPORTANT.

Complete the Following Questions

- Why does your organization exist?
 - Why does it make a difference in the world?
 - What's unique?
 - What is your core purpose?
- Why is that important?
- Why is that important?

Understand Internal & External Factors



Understand Internal & External Factors

- Consider what you do know and what you need to know:
 - Stakeholder surveys and feedback
 - Current impact/outcome data
 - Market data comparisons
 - Competitive analysis data
 - Fundraising and Financial Trends
- Be open to testing and questioning assumptions
- Learn about and address the things you don't know that you need to know – what opportunities and challenges exist that you are not even discussing yet?
- Involve feedback from as many stakeholders as possible.

SWOT Analysis

STRENGTHS

Identify internal strengths,
assets and successes

WEAKNESSES

Identify internal
weaknesses, challenges
and barriers

OPPORTUNITIES

Identify external
opportunities, assets and
successes

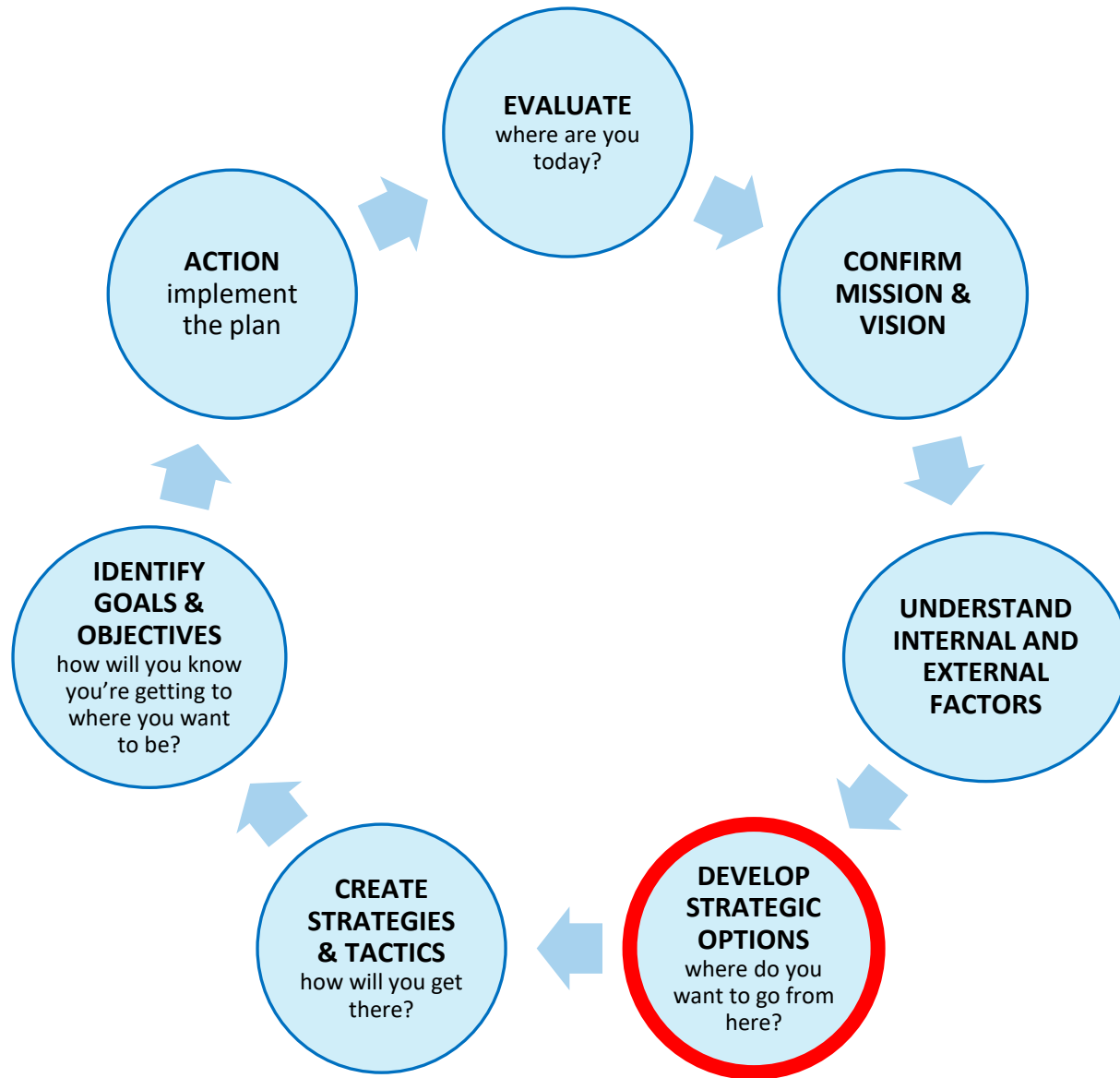
THREATS

Identify external
challenges, changes,
politics, policies, etc.

Start Stop Continue

START	STOP	CONTINUE
New programs, processes, policies, tactics to add and implement	Programs, processes, policies, mindsets, that you want to end	Programs, processes and things that are going well and you should continue or grow

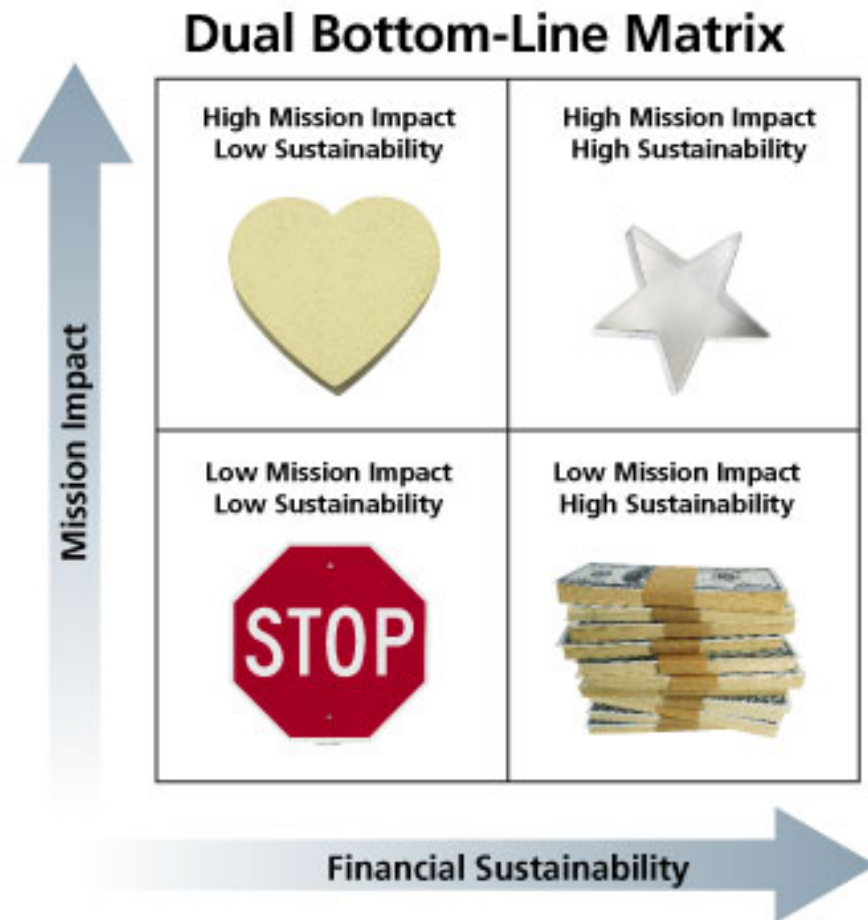
Develop Strategic Options



Develop Strategic Options

- At this stage of the process the goal is to prioritize and choose the options that have come out of your assessments and discussions and are most critical to the organization and stakeholders in the short, mid and long term.
- This is often a most difficult step because an organization can't be everything for everyone and staying on mission is critical to long-term organizational success.
- Consider the resources (financial, human, equipment, etc.) that you have and what certain initiatives will require to start filtering priorities for now vs things to consider in future plans. Not everything can be a priority.

Dual Bottom Line Matrix

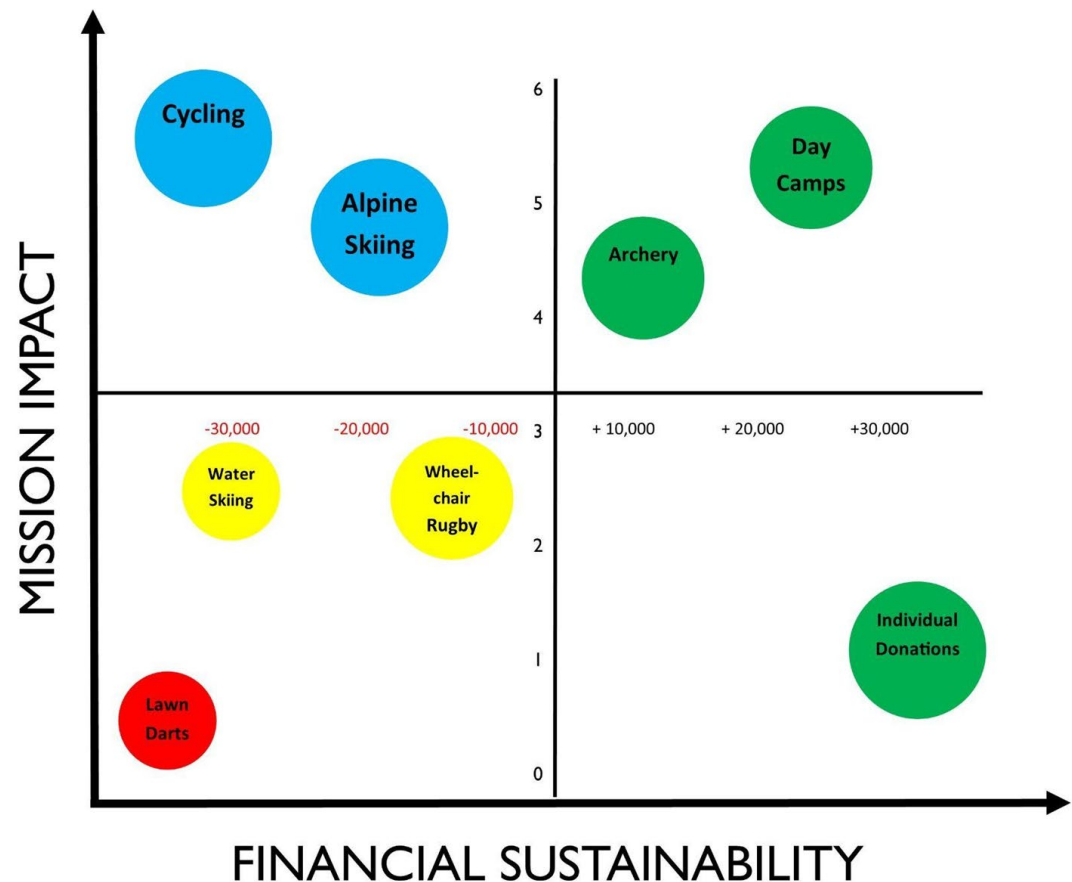


1. Assess relative mission impact

Choose four or five key variables and self-assess across all business lines: Mission alignment? Excellence? Scale? Depth? Fills an Important Gap (FIG)? Opportunities for growth?

2. Determine Profitability

Dual Bottom Line Matrix Sample

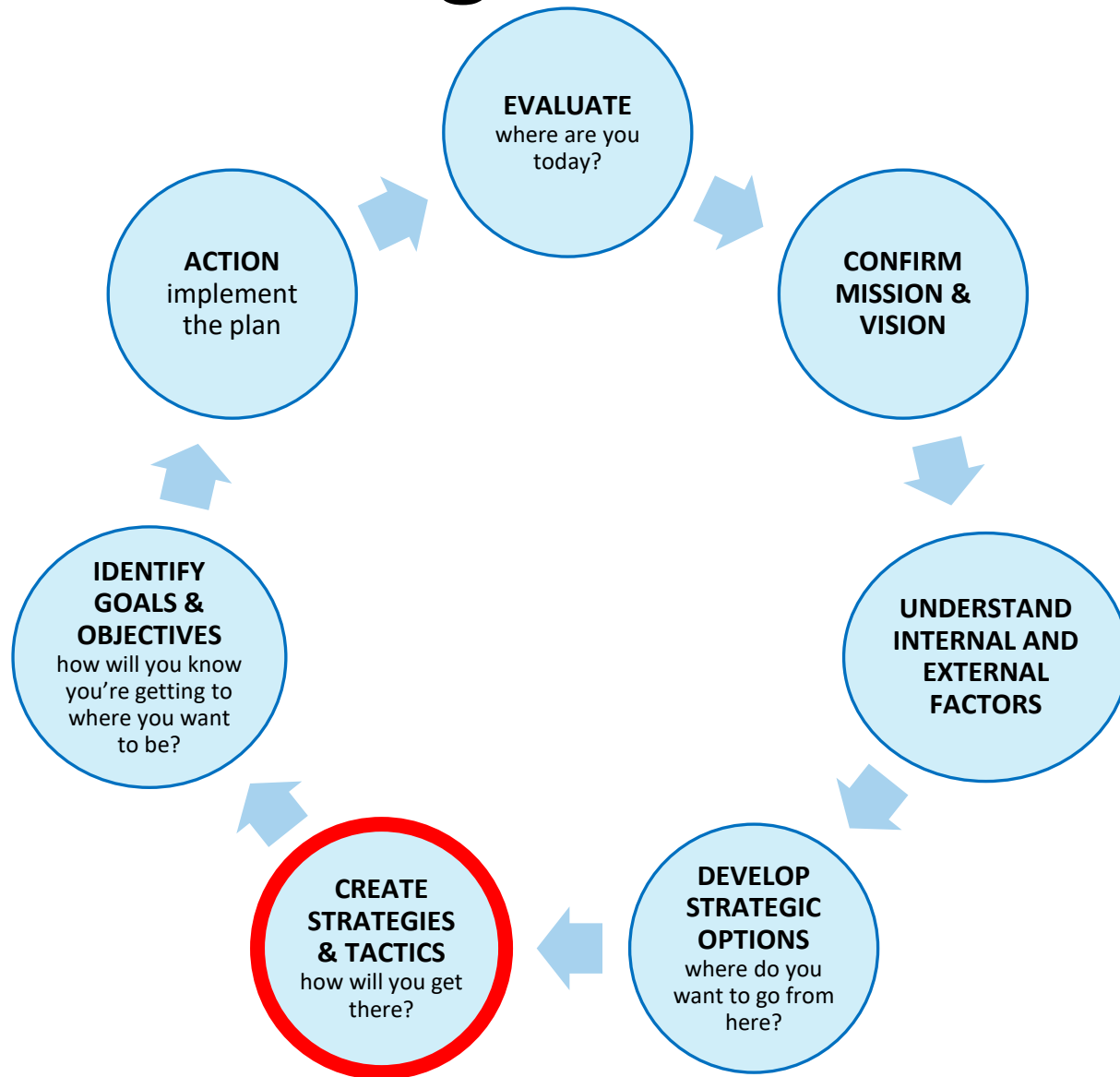


1. Assess relative mission impact

Choose four or five key variables and self-assess across all business lines: Mission alignment? Excellence? Scale? Depth? Fills an Important Gap (FIG)? Opportunities for growth?

2. Determine Profitability

Create Strategies & Tactics

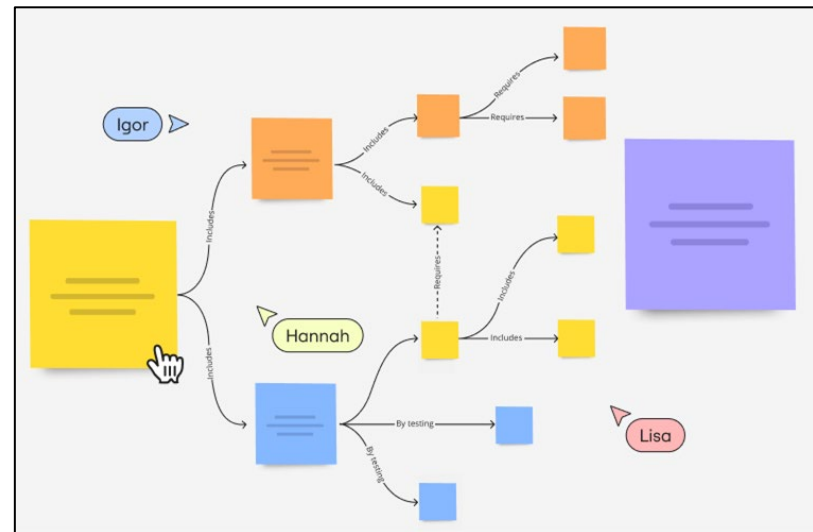




Create Strategies & Tactics

- This step and the remaining two steps are for the leadership team and staff to define and implement to address the priorities that have been developed and confirmed with your board (and other stakeholders when relevant).
- Be clear about the difference of ENDS vs MEANS
- You and your team cannot do everything, and you cannot do everything at once – be realistic!
- Do not include strategies and tactics for which you do not currently have resources in place to implement.
- Be clear about what you plan to do and why you are doing it
- Communicate, communicate, communicate!!!

Brain Dump or Idea Mapping



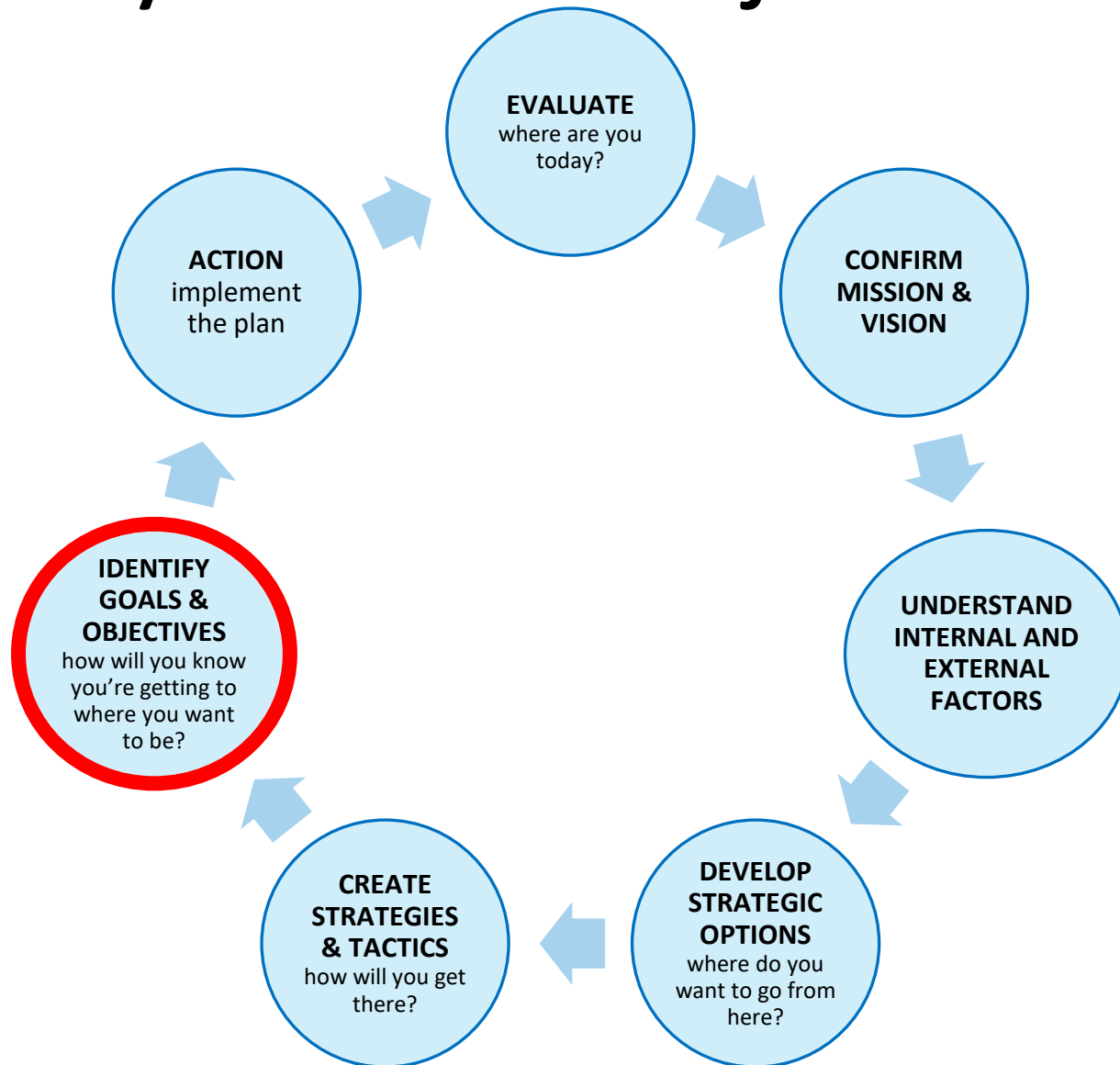
Pause and Practice



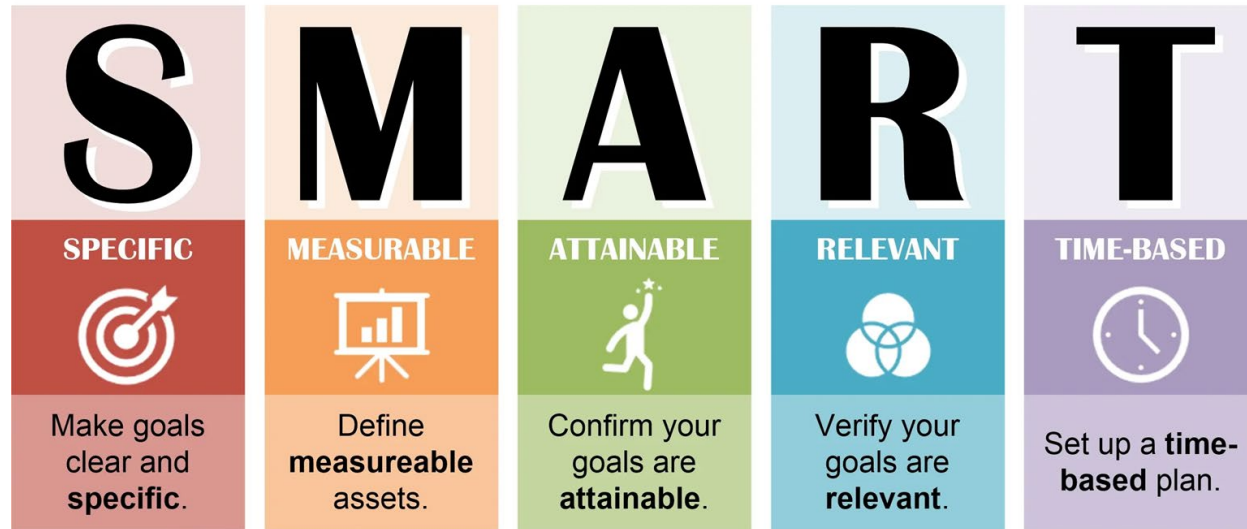
Use the next 15 minutes to work with your team members or self to practice with one of the above planning tools we have introduced.

Ed will be circulating around the room to answer questions, and Kim will be on screen if you have questions or would like input.

Identify Goals & Objectives



SMART Goals & Objectives



Let's practice writing a SMART objective.

One thing that has come out of your strategic planning process is that you want to grow your adaptive cycling program to better meet the needs of individuals with a certain disability, medical issue or other need.

What SMART objectives could you set for your strategic plan to meet this strategic priority area?

Strategic Goals

XYZ has consistent, tangible and transformative effects
for participants and stakeholders
(Shift and Ripple effects)

XYZ fosters understanding and advances a more inclusive,
equitable world and the power of ALL ability

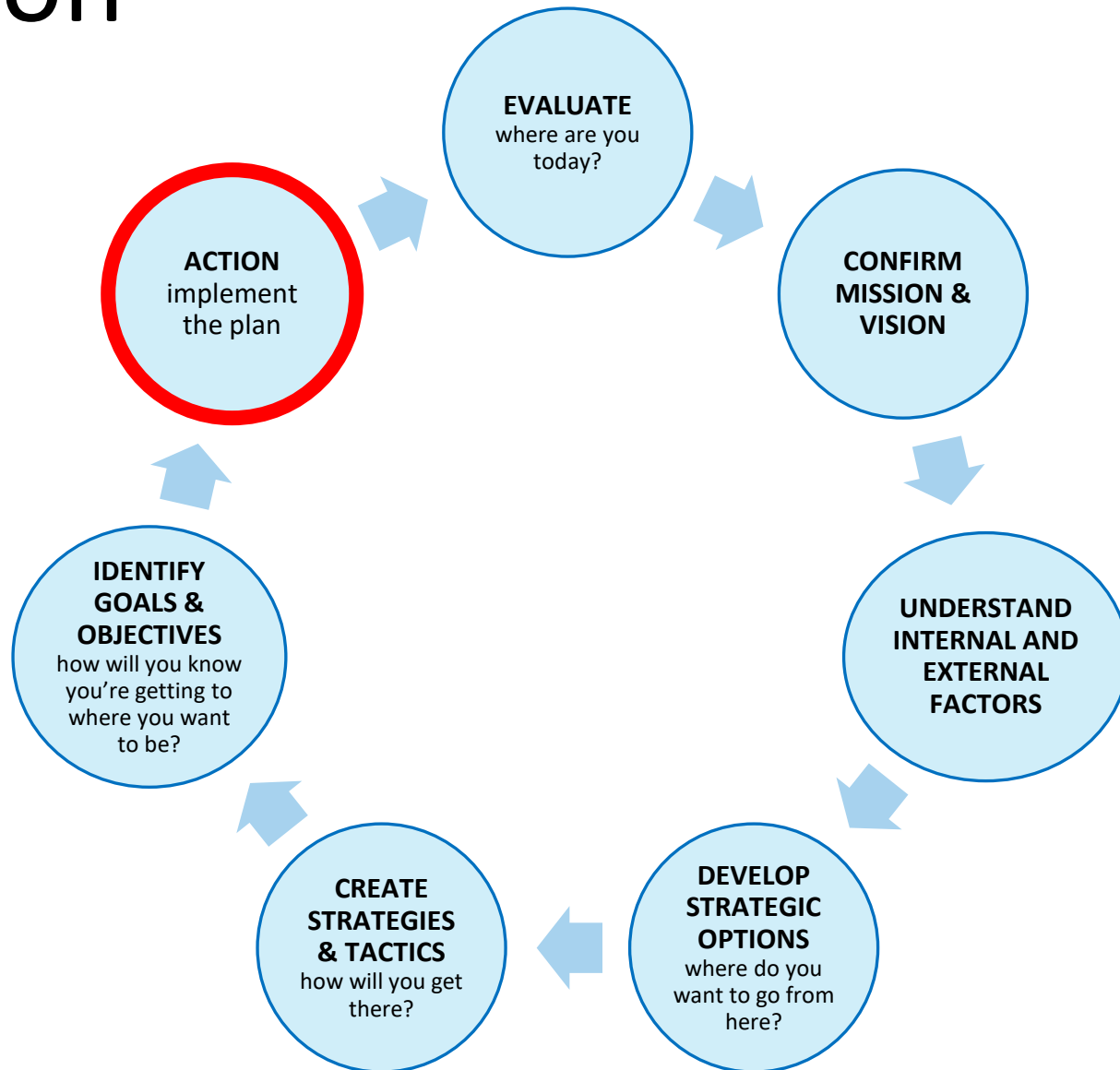
XYZ participants connect with their passions, family,
other people, themselves, adrenaline, and a sense of
freedom

XYZ advances the power of ALL ability

	Key Performance Indicators
Goal 1: Transforming Lives	
Objective 1.1: Expand access to programs and experiences	
Objective 1.1.A: All Program	increased program fee revenue; increased number of participants who participate in multiple programs; improved participant mid - and long-term outcomes from logic model; volunteer corps numbers meet program demand; Racial diversity of the participants served by the XYZ meets or exceeds the population of people living with disabilities in CO
Objective 1.1.B: XYZ Experience Programs	increased number of participants served and increased number and type of programs to include "experiences"
Objective 1.1.C: Program A	increased number of participants served; increased number and type of programs to include "experiences" and increased number of locations programs are offered
Objective 1.1.D: Program B	increased number of participants served and increased number and type of programs to include "experiences"
Objective 1.1.E: Program C	increased number of athletes served; increased number of XYZ athletes who represent their countries at the highest levels of alpine competitions, including the Paralympics.
Objective 1.2: Deliver a high quality programs and seamless customer experience from interest in XYZ through post -experience follow up	increased level of customer satisfaction and program quality ratings of XYZ programs and experiences; Methodology for defining and assessing program quality/implementation of "5 pillars" developed and implemented

	Staff Accountable	Timelines/Milestones XXXX	Timelines/Milestones XXXX	Timelines/Milestones XXXX	Timelines/Milestones XXXX
<u>Goal 1: Transforming Lives</u>					
<u>Objective 1.1: Expand access to programs and experiences</u>					
<u>Objective 1.1.A: All Program</u>					
Leverage program size, reach and geographic coverage to differentiate XYZ in the market	Sam	Budgeted at approx. 50% of typical program capacity due to COVID-19	75% of Typical program numbers = 3,000	100% of Typical program numbers = 4,000	10% growth year over year = 4,400
Determine core program portfolio and pricing model	Alex	complete portfolios and pricing model	update program portfolio and pricing model with addition of new programs	update program portfolio and pricing model with addition of new programs	update program portfolio and pricing model with addition of new programs
Add new sports and experiences based on market analysis, stakeholder surveys and current gap analysis	Alex	Create a participant survey and identify how/where to collect responses beyond our current XYZ database	Complete participant survey by end of Q1 - compare results to current XYZ offerings and market analysis	Pilot new sports identified in research as desirable and sustainable; tie to equipment objectives	Pilot new sports identified in research as desirable and sustainable; tie to equipment objectives
Grow Volunteer corps and expand program instruction expertise and diversity to meet program support needs	Joe	Develop volunteer recruitment plan and implement by Q4; Goal at 75% return to typical year: Total applications = 518; Total Active Volunteers = 455	Implement volunteer recruitment plan; Goal at 100% return to typical year: Total applications = 690; Total Active Volunteers = 607	Grow volunteer outreach; 5% Growth: Total applications = 725; Total Active Volunteers = 637	Grow volunteer outreach; 5% Growth: Total applications = 761; Total Active Volunteers = 670
Increase the racial diversity of the participants served by the XYZ to meet or exceed the population of people living with disabilities in CO	Jamie	Identify the diversity of our population of participants we currently serve and research barriers to BIPOC participation	Increase Black participants to 5% of total and Increase Hispanic/Latino participants to 15% of total	Maintain Black participants to % of population and Increase Hispanic/Latino participants to 17% of total	Maintain Black participants to % of population and Increase Hispanic/Latino participants to 19% of total

Action



Summary

The process of strategic planning requires you to:

- Listen to the multitude of interests of your many stakeholders,
- Collate and discuss those aspirations
- Determine the organization's priorities
- Affirm what you will say “yes” to – and what you will say “no” to, that will best serve your organization's mission
- Implement sound business practices to measure progress all along the way.
- Repeat and Revise

Proactive, open and honest communication with all stakeholders throughout the process will lead to the best results and allow for swift and effective implementation.

Thank you!

Q & A

Learning Objectives

1

Provide the basics of best practices for strategic planning.

2

Review and showcase the steps in a strategic planning cycle.

3

Develop a segment of a sample strategic plan using tools from the session.

Session Presenters Contact Information



Ed Bronsdon

edbronsdon@icloud.com

206.499.5821



Kim Krebs

kimkrebsconsulting@gmail.com

303.884.5571