



NATIONAL COUNCIL *of* **JEWISH WOMEN**

Annual Strategic Planning 101

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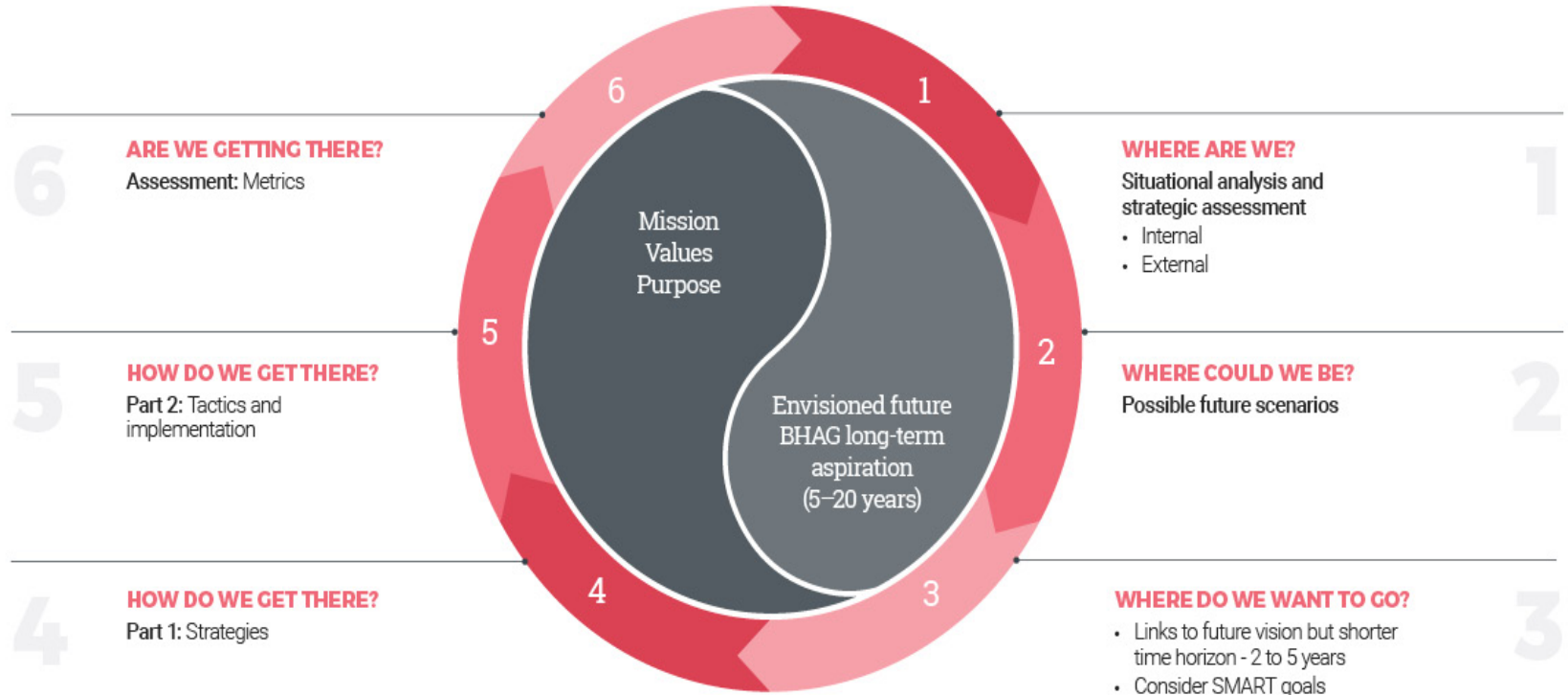


June 29, 2020

Agenda

- Intro
 - The What & Why of a Strategic Plan
- What are the Key Questions
- Plan the Work & Work the Plan
 - Brainstorming Breakouts
- Tracking Success
- Sample Plans
- Questions & wrap up

STRATEGIC PLANNING PROCESS



The Four Questions

1. Where are we now?
2. Where are we going?
3. What is our work plan & Who will do the work
4. What do we need to get where we want to go?

Coming together on the Plan

- Alignment
 - Leadership
 - Vision & Strategy
 - Community needs
 - Organization

Where are we Now?	Where are we going?	What's in our work Plan & Who will do it?	What do we need to get where we are going?
<ul style="list-style-type: none">• SOAR	<ul style="list-style-type: none">• Vision• Mission• Values	<ul style="list-style-type: none">• Time Leadership• Communication• Buy-in• Resources• Technology	<ul style="list-style-type: none">• Objectives• Strategies• Tactics• Metrics

1. Where are we now ? Let's SOAR!

- SOAR
 - **S**trengths: The capabilities and accomplishments
 - **O**pportunities: Profitable circumstances, threats reframed into possibilities
 - **A**spirations: Desired vision of company
 - **R**esults: Measurable goals which have been achieved
- Internal & External Check-in

Strengths

What the organization does well, along with its key assets, resources, capabilities, and accomplishments.

Example questions:

- What do we excel at?
- What are our greatest accomplishments?
- What are we most proud of?

Opportunities

Circumstances that your team could leverage for success, eg. to improve profitability, market share, or competitive edge.

Example questions:

- What partnerships would lead to greater success?
- What changes and trends in the market align with our strengths?

Aspirations

A vision to build on current strengths, provide inspiration, and challenge the current situation.

Example questions:

- What do we want to achieve in the future?
- How can we make a difference?
- What are we passionate about?

Results

Tangible outcomes and measures that demonstrate you've achieved your goals and aspirations.

Example questions:

- What measures will tell us we are on track to achieve success?
- How do we translate our vision of success into tangible outcomes?

2. Where are we going?

- What's our refined Vision?
 - Does it match with who are?
 - If success was a place, how would you know you are there?
- What are your longer range goals, how do they fit into the next year?
 - Descriptive
 - Why
 - Creating a blueprint
 - KPI – Key Performance Indicators

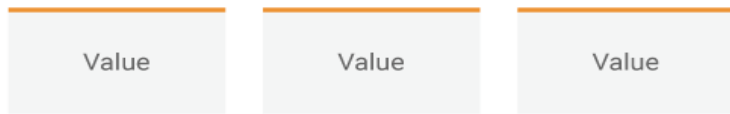
3. What's in our work Plan & Who will do the work?

- Specific Objectives & Initiatives
 - Working backwards
 - What's the most important thing(s) you should be doing?
 - What are your top 1-4 goals?
- Who will do the work
 - Tasks
 - Roles
 - Responsibilities

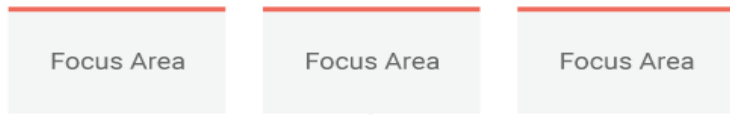
The Cascade Model



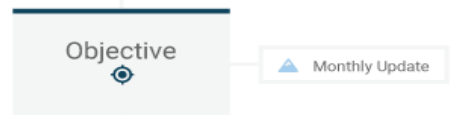
Every significant action in your organization going forward will ultimately be contributing towards this.



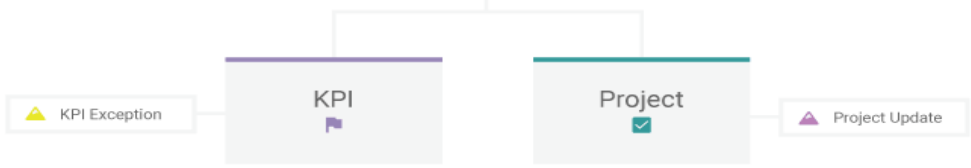
Values help unite your organization through a tight set of core beliefs that everyone shares & embraces.



High-level categories that your organization will be focusing on as you strive towards your Vision. They should not have a metric or deadline.



These define what your organization wants to achieve and are more specific than Focus Areas, in that they have a deadline.



Numerical measures to help you determine whether or not you're meeting your Objectives.

Specific things you'll deliver to realize your Objectives. They should have clear owners, start and end dates.



	Where are we Now?	Where are we going?	What's In our work plan & Who will do it?	What do we need to get Where we are going?
1	<ul style="list-style-type: none"> • SOAR 	<ul style="list-style-type: none"> • Blue Print 	<ul style="list-style-type: none"> • Time Leadership • Communication • Buy-in • Resources • Technology 	<ul style="list-style-type: none"> • Objectives • Strategies • Tactics • Metrics
2	<ul style="list-style-type: none"> • Vision 	<ul style="list-style-type: none"> • Values 	<ul style="list-style-type: none"> • Focus Areas 	<ul style="list-style-type: none"> • Projects/Programming
3	<ul style="list-style-type: none"> • Goals 	<ul style="list-style-type: none"> • Communication 	<ul style="list-style-type: none"> • Staffing 	<ul style="list-style-type: none"> • Score Card

Break- outs & Brainstorming

What's the most important thing(s) you should be doing?

What are your top 1-4 goals?

4. What do we need to get, for where we want to go?

- Have we communicated the plan clearly?
 - Words, audio, pictures
 - Alignment
 - Matching Goals with Motivation
- Have we lined up the work with the talent?
 - Review of resources, time, funding
 - What are the road bocks
 - Do you have group buy-in
 - What risks can we mitigate
 - What are the gaps for the key functions

WORK ACTION PLAN

GOAL

BENCHMARKS FOR SUCCESS

EVALUATION PLAN

STRATEGIC ACTION DESCRIPTIONS	PARTY / DEPT RESPONSIBLE	DATE TO BEGIN	DATE DUE	RESOURCES REQUIRED	POTENTIAL HAZARDS	DESIRED OUTCOME

ADDITIONAL NOTES

Metrics for Success

- Goals should be monitored at least on a quarterly basis.
- Goals should be reviewed and updated to reflect current market conditions and changes to ensure that goals are focused on the current state of the organization.
- Use the goal document to keep track of goal completion status.
- Talk about goals at every staff meeting to ensure everyone understands its priority.

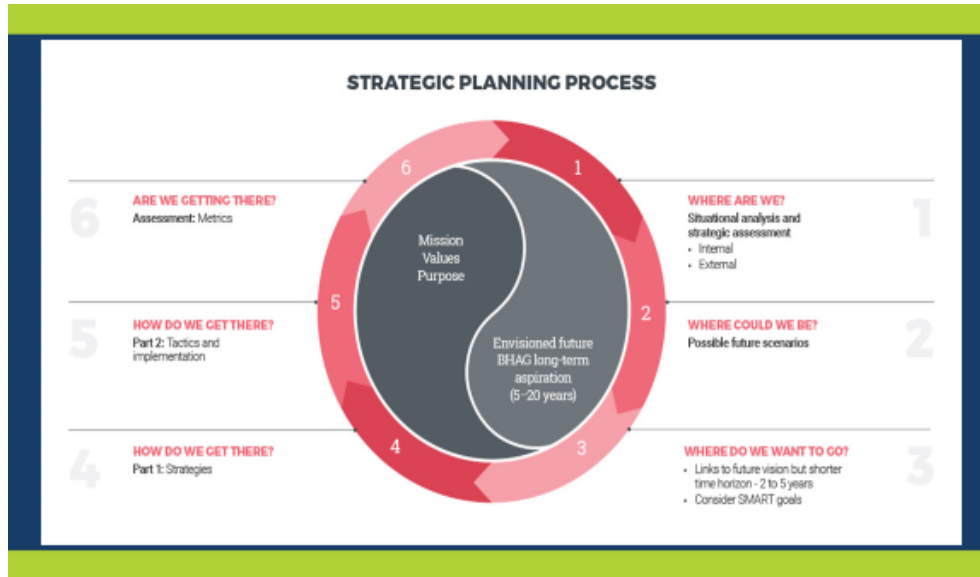
Top 10 Strategic Planning Best Practices

- 1) Pull together a diverse, yet appropriate, group of people to make up your planning team.
- 2) Allow time for big picture and strategic thinking.
- 3) Get full commitment from key people in your organization.
- 4) Allow for open and free discussion regardless of each person's position within the organization.
- 5) Think about execution before you start.
- 6) Use a facilitator, if your budget allows.
- 7) Make your plan actionable. Articulate goals, action steps, responsibilities, accountability, and specific deadlines.
- 8) Write the plan in "pencil."
- 9) Clearly articulate next steps after every session.
- 10) Make strategy a habit, not just a retreat.

Questions & Wrap-up

Remember it's process.

Strategy is about Choices



Strategic Planning



- Purpose of Strategic Planning-why it matters?
- Strategic Planning Framework (elements of plan)
- Teamwork
- Keeping your strategic plan alive

Framework for Strategic Planning

01

Foundation

MISSION STATEMENT

Why do we exist? What is our purpose?

- Who do we serve? Who are our primary and secondary stakeholders?
- Which stakeholder needs are we meeting?
- What services do we offer to meet those needs?
- What is our distinctive competency? What makes us unique?

VISION STATEMENT

What is our long-term, aspirational vision of the impact we seek to achieve?

VALUES STATEMENT

What core beliefs underlie our work?

02

Current Situation

EXTERNAL ANALYSIS

What environmental trends affect us and how?

What opportunities and threats do we face?

What are our stakeholders' needs and how well are we meeting them?

INTERNAL ANALYSIS

What are our organizational strengths?

What are our weaknesses/areas needing improvement?

03

Strategic Direction

STRATEGIC PLAN STATEMENT

Where is our organization going in the next 3-5 years?

- What difference can we make in 3-5 years?
- What will our organization look like?
- What will be changed for our stakeholders?

GOALS

What are the top 4-7 priorities we need to accomplish?

STRATEGIES

How will we achieve these goals?

TIMEFRAME

When do we plan to execute these strategies?

04

Implementation

ANNUAL OBJECTIVES

What specific, measurable components of the goals and strategies will we accomplish this year?

ACTION PLAN

What tactics and activities need to be undertaken, by whom, etc.?

OUTCOMES

How will we define and measure success?

Thank You!



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