Using Your Strategic Plan to Maximise Positive Impact

Speaker: Belinda Moore
You do not exist to recruit or retain members.

You exist to make a positive impact for those you serve.

Great planning ensures you achieve this.
High performing associations ... 

• Create a compelling shared vision of the future.
• Convert that vision into a strategic plan (a Roadmap to that Future), and
• Operationalise that strategy effectively.
“If you don't know where you are going, any road will get you there.”

Lewis Carroll
Strategic Planning is Evolving ...

- Functional -> Impact.
- Large -> Succinct.
- 5 year -> 3 year.
- Rigid -> Flexible.
- Workshop -> Process.
- Face-to-Face -> Online.
- Presentation -> Discussion.
Every strategic plan is different

• For volunteer-run associations it may be simple enough to also be the operational strategy.
• For more complex organisations it is the foundation upon which a detailed operational plan can be developed.
Planning for an association requires an understanding of the operating environment of your sector and the association sector.
The Operational Landscape is Shifting ...

• Technological.
• Competition.
• Generational.
• Work & lifestyle.
• Ease of connection.
• Many communication channels.
• Communities & tribes.
• COVID-19.
Don’t ask people what they want. Understanding what they need.

What keeps your members up at night? How can you solve these problems?
Choose functions that create impact.

• Mobilisation.
• Representation.
• Participation.
• Service Provision.
• Community.
Planning must also ensure you are maintaining a sustainable organisation that is operationally positioned to create an impact.
Enablers include:

- Leadership
- Governance
- Technology
- Business & membership models.
- Value proposition
- Communications.
- Stakeholder engagement.
- Components structures.
- Skilled staff and volunteers
- Organisational culture.
- Revenue diversity.
- Business development.
Business, membership, and component frameworks must align to your purpose and functions.
Business, membership, and component models are evolving.

- Traditional -> contemporary models.
- Alignment of models to purpose & function.
- Community as a competitive advantage.
- “Creator/distributor” to “facilitator/platform”.

No “one-size-fits all” model exists.
Great strategies are **NOT** created by showing up on a random day with a blank sheet of paper.

Planning is a process that helps you **FOCUS** on where you can make the most positive **IMPACT** on your **PURPOSE**.
Strategic Plan Inclusions:

1. **Timeframe** – A specific timeframe for the plan.

2. **Vision** – An inspirational and concise statement about the positive outcome for those you serve if all your work was successful. Eg: A world without Alzheimer's disease (Alzheimer’s Association).

3. **Purpose** – A simple statement outlining why you exist and how you will reach your vision. Eg: We look after doctors so they can look after you (British Medical Association).

4. **Strategic Objectives** (Priorities or Outcomes). Two-three specific outcomes you will achieve to advance your purpose.

5. **Strategies** (Goals or Projects). Underneath each objective list the 3-6 specific ways you will advance each objective.

6. **Enablers** – Projects that will ensure the organisation is operationally positioned to deliver on the strategy.
### Strategy On-A-Page Template

<table>
<thead>
<tr>
<th>TIMEFRAME</th>
<th>What is the duration of the plan?</th>
</tr>
</thead>
<tbody>
<tr>
<td>VISION</td>
<td>What is your vision of the future if everything you do is successful?</td>
</tr>
<tr>
<td>PURPOSE</td>
<td>Why do you exist? What do you do and for whom?</td>
</tr>
</tbody>
</table>

#### STRATEGIC OBJECTIVES

<table>
<thead>
<tr>
<th>Objective 1 – What will you achieve on behalf of those you serve?</th>
<th>Objective 2 – What will you achieve on behalf of those you serve?</th>
<th>Objective 3 – What will you achieve on behalf of those you serve?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1 Strategy</td>
<td>2.1 Strategy</td>
<td>3.1 Strategy</td>
</tr>
<tr>
<td>1.2 Strategy</td>
<td>2.2 Strategy</td>
<td>3.2 Strategy</td>
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<tr>
<td>1.3 Strategy</td>
<td>2.3 Strategy</td>
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</table>

#### STRATEGIES

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<tr>
<td>1.3 Strategy</td>
<td>2.3 Strategy</td>
<td>3.3 Strategy</td>
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</tbody>
</table>

#### ENABLERS

<table>
<thead>
<tr>
<th>4.1 Strategy/Project</th>
<th>4.2 Strategy/Project</th>
<th>4.3 Strategy/Project</th>
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Use a facilitator who is engaging enough to keep people engaged – but firm enough to keep them focused and moving forward.
Questions?

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Strategic Planning Process:

Step 1: Plan Your Process

1. **Output.** What if your preferred format for your strategy-on-a-page?

2. **Outcomes.** Other than the strategy, are there any other outcomes we need to achieve?

3. **Logistics.** Will the process be entirely online, or will there be face-to-face elements?

4. **Consultation.** Is consultation required? If so, who needs to be engaged in the process and how?

5. **Process.** What steps are involved in the process? What are the proposed dates and timing? Who needs to be a part of each step?

6. **Issues.** Are there any issues or challenges that must be addressed during this process?
Strategic Planning Process:

Step 2: Undertake Consultation

Consultation can be as complex a full stakeholder engagement process or as simple as getting all workshop participants to respond to a list of questions.

From this process we are seeking to understand things such as:

• Who do we serve?

• What are the biggest positive impacts we could have on those we serve over the duration of this plan?

• How can we ensure we are operationally positioned to deliver?

• What are the biggest barriers to our success?
Step 3: Create a Draft Strategy

- A robust consultation process will enable you to develop an evidence-based draft strategy.
- This “strawman” provides an excellent starting point for your Strategic Planning workshop.
- This draft may take several sessions and involve different groups to create and validate.
Strategic Planning Process:

Step 4: Issue the Agenda.

Your papers for your strategic planning workshop should include:

- Agenda,
- Draft Strategy,
- Supporting Documentation, and
- Other pre-reading.

These will all be taken “as read” on the day.
Strategic Planning Process:  

Step 5:  
Run the Workshop.

A large group of people together is a significant investment of time. Do not waste their time with activities that should be done beforehand. Eg: SWOT analysis.

- **Quickly set the context and tone** – If not already done during the processes, a succinct high level trends presentation.

- **Use a robust discussion format** – Work through the draft strategy from top to bottom. If online, encourage use of the chat.

- **Keep discussions focused** – Regularly take quick votes to narrow discussion and avoid tangents.

- **Keep it realistic** – Before finalising the plan discuss any barriers to success and where it is achievable.

- **Agree next steps** – Clarify next steps. Generally this is to agree the strategy and pass to the staff team for operationalisation.
Strategic Planning Process:

Step 6: Operationalise Your Plan

Once your workshop is complete you are ready to operationalise the plan. This includes:

• Developing measurable, time-dependent KPIs.

• Creating succinct Board and staff reporting format that informs operational and strategic decision making.

• Develop an operational plan and budgets – use this opportunity to generate cross-functional engagement.

• Schedule your review points.
Focus ...
... on impact.

• To proactively influence the industry agenda.
• To facilitate pre-competitive collective action within the industry.
• To facilitate more efficient transactions between all parties in our industry.
• To create a strong pathways into and within the profession.
• To foster a well trained and highly skilled profession.
• To ensure an adequate supply of professionals into the industry.
• To ensure professionals have access to the tools, insights, and support needed to be successful.
• To be the independent voice for users navigating a complex digital world.
• To be a strong voice for the profession.
• To operate a sustainable, efficient, and effective organisation.