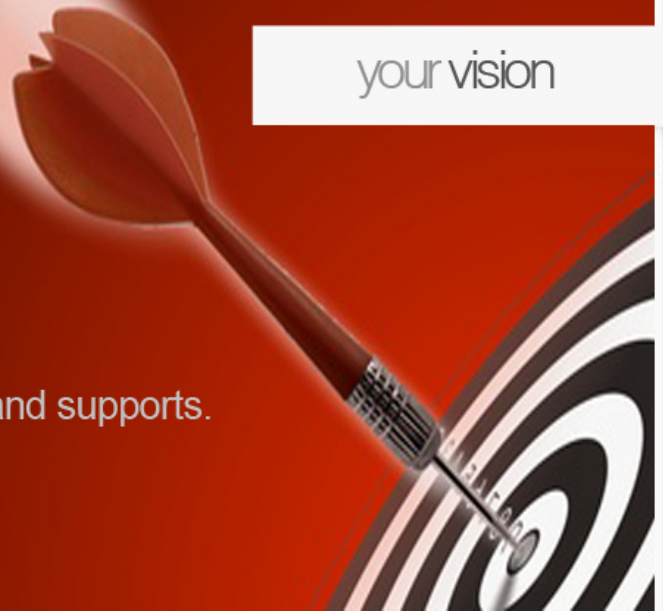


Ron Woodbury  
Consulting

your vision

## Clear and Concise

A shared vision everyone understands and supports.



Here are four simple steps to help you develop, or update, your Strategic Business Plan.

It's time to take the complexities out of building and maintaining your organization's strategic business plan. This guide is designed to take you through the basic steps of building and supporting a clear strategy for your future.

### Phase I

Build the foundation of your strategic business plan.

### Phase II

Identify your primary strategic initiatives or goals.

### Phase III

Core competencies and your company's operation.

### Phase IV

Communicate, implement, and align your new plan.

We've all been there during our professional or volunteer lives. The energy to develop a strategic business plan is on *full-boil*. Everyone is on board, consensus appears to be in-hand, our future is mapped out, and we are confident nothing can get into our way.

Then what? We find ourselves in the midst of a strategic minefield where every step has a greater propensity to destroy our planning, rather than support the success of our future.

This minefield is nothing more than the reality of your daily operation. After all, with all of the downsizing (excuse me, *rightsizing*) instituted during the past decade, who has the time and resources to tackle a new strategic goal, when many of us are treading water as we are forced to do the jobs of those who have been asked to depart the organization.

At [Ron Woodbury Consulting](http://RonWoodburyConsulting.com), we take a clear and simple approach to developing your strategic business plan. An approach designed to keep organizations focused on what they can, and should, be doing today in order to accomplish their desired future.

We have broken our planning strategy into four phases. During these phases you will identify and solidify the *foundation* of your strategic plan. This includes your Vision, Mission, and your Values. Until this initial phase is complete, we don't believe there is any sense or value in moving forward.

Once the initial phase is complete, the rest fall into place rather easily. Please, take a few minutes to review this document to see if this methodology fits well with your organization.

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# Vision & Mission

## Phase I

The initial phase of your plan development addresses three foundational elements. Once developed, these items rarely change, as they are the bedrock upon which your future will be built. Your strategic foundation includes your **Vision, Mission, and Values**.

## Vision

### Strategic Business Plan Review.

Do you need minor adjustments or a complex analysis of your business plan?

We can provide you with a free consultation to determine the scope of your strategic planning needs. You may be surprised at how easy it is to get your organization focused on the future.

Your vision is a clear and powerful message that identifies your **desired future**. It articulates where you are taking the organization. Without a clear vision, resources could easily be wasted on well-intentioned (yet strategically irrelevant) activities. Resources may support **important** activities, but will you truly make the necessary progress to move closer to your desired future?

Keep your vision long-term, but achievable. Don't let the definition be driven, clouded, or influenced by current or short-term challenges. Furthermore, be sure it is developed by consensus, not the most vocal person(s) in the room. Your vision must outlast the term-limits of current board members, and the CEO's contract.

When crafting your initial vision, or making a rare change to an existing vision; let the statement sit in a review

period for a few weeks to ensure *everyone* is on board. If you develop and adopt your vision on a Saturday afternoon during your annual planning retreat, you run the danger of rushing it's development, and risk adopting a vision that is too short-term. Odds are, you aren't finished yet.


This is your long-term desired future. Take your time and get it right - even if it takes a few edits. This is crucial to future support and integration.

Once your vision, along with your mission, (which we will discuss next), are crafted, it should clearly illustrate where you are headed. It is difficult - if not impossible - to have a vision that does nothing more than create short-term value. Without a clear vision, you may find yourself wasting time reviewing and re-editing the statement at every annual planning retreat.

## Mission

Your mission statement clarifies **what you do today** in the delivery of your services and/or the development of your products. It should also describe how you deliver your services. Your mission is quite different from your vision, although the two are often (understandably) confused. The easiest way to decipher the difference is to ask the question - "Why have I come to the office today?" The answer will reveal *what you do*, (mission), which is different from *where you are going* (vision).

# Continuing our Mission



## Phase I

## Mission (Continued)

### When crafting your mission:

Confirm it aligns with  
your vision.

Design a statement  
everyone understands.

Focus on what you *do*  
*today to serve your clients.*

Keep the statement  
customer or client  
centric.

You must have the  
resources or capital to  
deliver your mission.

Think of a mission statement as your thirty-second elevator speech. If you were in an elevator wearing your name badge, and a passenger asked you what your company does – the answer is your mission. You don't need to get into a discussion about how you plan to grow and expand services (that's covered by your vision). All they are interested in is a quick rendition about *what you do today*.

An example mission statement for a food bank may be to “Ensure no family goes to bed at hungry each night”. Their vision may be to help eliminate world hunger. But, their day-to-day focus (mission) is to feed the hungry, ensuring our community goes to bed with a full stomach.

Before you develop your mission statement, it is critical to have identified your vision. Without a vision, your mission will be ambiguous and will do nothing more than create noise. So, to reiterate, your mission identifies what you *do today* in order to achieve your vision – which is your *desired future*.

Mission statements are one of the most powerful aspects of your strategic business plan. Why? Well, if we arrive to work each day with one thing on our mind – *our mission* – there is a great chance our activities will be in the best interest of our clients, while we, at the same time, support our vision and strategic goals. We call this business alignment. This alignment occurs when our strategic business plan effectively cascades from our vision (desired future), to our mission (what we do today), to our strategic goals; which are the primary activities designed to move us closer to our vision, improve our quality of service, efficiencies, and competitiveness.

It's really quite simple. If we know where we want to go (vision), what we are doing today (mission), and we commit our resources to the strategies that align with and support our vision and mission – we will succeed. If your business plan is more complicated than that, I suspect you may have paid your last consultant far more money than they deserve.

As we craft our mission statement it is important to look at the organization and the operating environment - *today*. The mission of our organization may have changed over the past decade or so, so it is critical we do not get lost in the past. At the same time, your mission statement is not something you can change quarterly, or even annually. It is easy to get caught in a trap where we change the mission statement to fulfill short-term objectives. That is the role of your **Strategic Goals**. Unless the purpose of your business has dramatically changed, you've completed a merger, or maybe the regulatory environment has changed – you should rarely alter your mission statement.

# Our Values

## Phase I

## Values



To live, or  
to *aspire* to  
live your  
company's  
values?

If there is any aspect of your strategic business plan that should never change – it is your set of *values*.

Developing your organization's values requires the same discipline, patience, and commitment as your vision and mission.

As stated previously, values do not change. We don't turn honesty or integrity on or off in order to take advantage of an opportunity, or make a controversial hiring decision. Trust me, if we do, it will come back to undermine our company's reputation with great vengeance.

When we alter our values, either the values were not properly identified in the first place, or the company may be choosing to selectively add and delete values to take advantage of a short-term opportunity.

If someone, or some company, is in a position to compromise a value (i.e. honesty), for short-term gain, it may be time for a business ethics lesson. Daily decisions (in the boardroom and front-lines) should all be done in the context of your company's values. Planning, hiring, client service, or contract negotiations – nothing is exempt, nothing should be compromised. Clear and simple: No value is to be compromised.

Don't confuse operational metrics with values. "Quality customer service" may be construed as a *value*; as most would agree there is great value in delivering high-quality customer service.

Remember: The *values* we set for our company are the virtues that reflect who we are and how we act. They define our company's personality.

For illustration purposes, let's assume we have three values, all of which are *absolutely* core to our mission and purpose. **Honor** (to garner respect from our funders, as we are stewards of grant, endowment, and gifted monies); **Empathy** (to reflect the emotional commitment we have to our organization's constituencies and clients); and **Creativity** (to ensure we are proactively searching for new and innovative ways to improve our services and operational effectiveness).

It's 9:00 a.m. on a Monday morning, and our Management team has just returned from a weekend planning retreat. In hand, and top of conversation, is our *new* set of organizational values. Would you expect *everyone* to actually exhibit these new values – simply because they were identified at the planning retreat? Will all of your newly hired employees perfectly align with your values? These values may very well be perfect for your organization; but this is where *living* vs. *aspiring* comes into play. It is more important to have everyone *aspire* to be true to your values, than expect everyone to be onboard Monday morning. The notion of **aspiration** also sets the stage to constantly improve the organization's moral compass, as we seek a common goal to continually improve our organization.

# Strategic Initiatives

## Phase II

## Strategic Initiatives



### Strategic Business Plan Review.

We can provide you with a free consultation to determine the scope of your strategic planning needs. You may be surprised at how easy it is to get your organization focused on the future.

This phase can be the most challenging aspect of your strategic planning process. It is easy to get caught-up in nomenclature, terminology, or wordsmithing distractions. Don't run the risk of losing sight of the business opportunities and challenges at hand. It doesn't matter what terms we use. It's the clarity and understanding that leads to action. That's what really matters.

In order to minimize the ambiguity, let's clarify a few often-misunderstood terms. Strategies, for example, can mean high-level initiatives in some industries; while goals, may have the same meaning in others. We will use the notion of strategic goals, or strategies, as our highest-level initiatives. These will be the very few in number, and the most important activities in our organization, as they are carefully crafted to move us closer to our vision. We also recommend avoiding "long-term" and "short-term" delineation of your goals. If they are strategic in nature, the timeline is only relevant when you are budgeting your resources (time & money). At some point, every long-term strategy becomes short-term as it nears completion. So to keep your plan simple, we are now recommending one category of strategic goals.

As important as building a consensus to validate your mission and vision, your strategic goals must have support at the board and management level, resource allocation must support your strategies, and your strategic goals must be understood by everyone involved in delivering the services to your clients.

One of the most important lessons for any strategic goal setting process comes down to one single word: **Resources**. It is so easy to spend a Saturday afternoon during a planning retreat filling up page after page of flip charts with things we "Must Do" in order to be successful and deliver the services our clients deserve.

Then reality sets in, after the euphoria of wanting to conquer the world, we realize we have extremely limited resources. And, to complicate the issue, we often find we have too many opinions of what to do, how to do it, and when to get it done once we leave the planning room and are planning our fiscal budget.

We recommend your inventory of strategic goals should be less than six. They must all support your vision and mission, and **you** must be willing to allocate the resources (financial and human) necessary to support their completion. Otherwise, you will spend more time at your board meetings discussing why things aren't getting done, as opposed to celebrating your successes.



# Core Competencies

## Phase III

Whether you are running a non-profit agency or for-profit small business, there is a specific thing or two that you do quite-well. Otherwise, you probably wouldn't be in a position to provide your clients with the much needed or desired services you deliver to them today. Let's take a moment and talk about your core competencies.

## What You Do Best

Core competencies keep your strategic goals, resources, and activities focused on the thing or things that make your company or agency successful.

Ask yourself today: "What is it about your agency that allows it to make a difference in peoples lives?"

That is your core competency. Keep it alive. Support it, foster it, and promote it.

This isn't about egos, pride, or being better than the company or agency down the street. For illustration purposes, let's look at this from a non-profit agency's perspective: *Altruistically*, many would love to be out of business if there were a solution or cure to the social challenge they strive to address. Think about it for a moment. If you ran a local food-bank, you would probably sleep much better at night if you were out of a job because someone solved world-hunger. I think we all would. In the meantime, our challenges are great; therefore we must spend our energy and resources on activities that keep us effective, efficient, and consistently focused on our mission. And, in the midst of these pressures, we cannot afford to stray from our vision.

We need to think like a business. When running your non-profit agency, you must have a competitive edge in order to attract funding, obtain in-kind services, process effective grant writing, and efficiently deliver your services to your clients.

So, what is it about your agency or business that incents you to do your job well, and encourages you to "put in 110%" every day – knowing that if you focus on that **one thing** - your company, and *your* company alone, is going to make a real difference to those you serve? That, my friends, is your **Core Competency**.


A real core competency is difficult for others to replicate. So protected and foster it.

Here are some examples of "Core Competencies" from various services industries that will help you identify what you do, or should be doing, the best you possibly can:

Food bank: "Nobody leaves our site without a full bag of groceries"

Family service: "No member of our client's family is without confidential and comprehensive resources to help them be part of the solution."

Grant writing: "Our grant writing process is so efficient and effective, we have tripled the amount of funding available to serve our mission."



# Communication

## Phase IV

### Communicate & Implement

#### Put your new plan into everyone's hand.

Regardless of your budget, there are very low-cost ways to put the elements of your business plan into the hands of every director and staff member.

The most powerful and effective tool is a simple business-card sized tool with the Vision, Mission, and Values. These items rarely change, and should be understood and accessible by everyone.

This is the fun part. Now that you have confirmed your Vision, Mission, and Values. And, you have articulated a manageable inventory of strategic goals to support your desired future – it's time to communicate the plan with your staff, volunteers, partners, and customers. Additionally, a critical aspect of this final phase is to *align* the strategic plan with your daily operation. Without this *alignment*, it will be nearly impossible to experience the changes identified in your strategic plan.

How do we get everyone to understand and motivated to support your new desired future? The simplest way is to have everyone identify how they, *personally*, contribute to the achievement of the strategic business plan; which, in turn, creates natural support and buy-in by everyone involved. So, we must:

1. Educate *everyone* on the fundamentals of the plan.
2. Identify and incorporate *simple to manage* metrics to encourage, incent, and reward employees for their success.
3. Develop a business alignment model to illustrate the connection from the highest level (vision) to the daily operation (your processes.)

Aligning your plan with your daily operation is a very critical component to the success of achieving your desired future. This is the concept we call **Business Alignment**. If you are simply "running the business" the old way, you will find it difficult to support the strategies of your strategic business plan. Think of business alignment as a simple waterfall. Envision the alignment as it cascades from your Vision, Mission, Values, Strategic Goals, and Core Competencies, down to the processes of your daily operation.

Without a good business alignment model, our strategies may become derailed or never even get initiated, our frustration levels heighten, and the confidence in our strategic business plan will be undermined. Some of the most common obstacles to achieving business alignment, are: Lack of consistent & clear communication, the ability or commitment to allocate financial and operational resources to support your strategic initiatives, and employees or leaders who do not wholeheartedly support your business plan.

Another common obstacle is a business' desire to get it *perfect* before deploying processes and tactics to support your plan. Unless you have regulatory or security risks – use the 85% rule. If it's 85% ready, get it into your operation – knowing there will be modifications. This is a far better tactic than waiting for the product, process, or initiative to be 100% ready. (You many need to set your pride aside for some time when taking this approach. But, you will find you are faster to market, and will be seen as an innovative company when you are taking this minimal risk.



# Summary

## Summary

Okay, now that we have reviewed the basic elements of our strategic business plan, how might you best implement these recommendations?

### Take your time and get it right!

After you develop your Vision and Mission, let them sit for a few weeks or a couple board meetings to ensure everyone is onboard.

### Have Any Questions?

Feel free to contact **Ron Woodbury** directly if you have any questions regarding this planning template its recommendations.

Take your time: Don't rush the process. A solid strategic business plan cannot be developed during a weekend retreat. Those days are gone. Unfortunately – usually due to the limited face time we have with board members, executives, staff, and other volunteers – businesses have historically attempted to build strategic plans in a day or so. And, quite often, during these couple of days, there is often networking, golf, and other activities. So, take your time, and get it done right. Use your annual planning retreat / event to reconfirm some your fundamentals, and discuss new strategic goals. But, please spend the appropriate amount of time necessary for *your* company to build a solid strategic plan.

Change the nomenclature so the plan speaks to *your* company. If you prefer to call “strategies” “goals”, or “initiatives” “tactics”, do so. As long as everyone understands the role and intent of each element in your plan, the terminology is irrelevant.

Start with the Vision, Mission, and Values. You should not move to the next step until these are understood and supported by everyone. Then, move forward.

When you document your strategic goals – keep the information in the business plan short and to the point. Depending on the complexity of the goals, there could be reams of paper and supporting documentation that manage the underlying projects. Keep those separate from the plan. Otherwise, you will be spending most of your time updating everyone's plan, the plans will grow to an enormous size, and the likelihood of them becoming shelf-anchors increases dramatically. Keep your strategic plan wafer-thin. Let the individual project managers, accountants, and other teams manage the underlying documentation.

Communicate, communicate, & communicate. Carve out time at each board and executive team meeting to discuss the progress, hurdles, and opportunities related to your strategic goals. Don't just report the status, but solicit input and ideas.