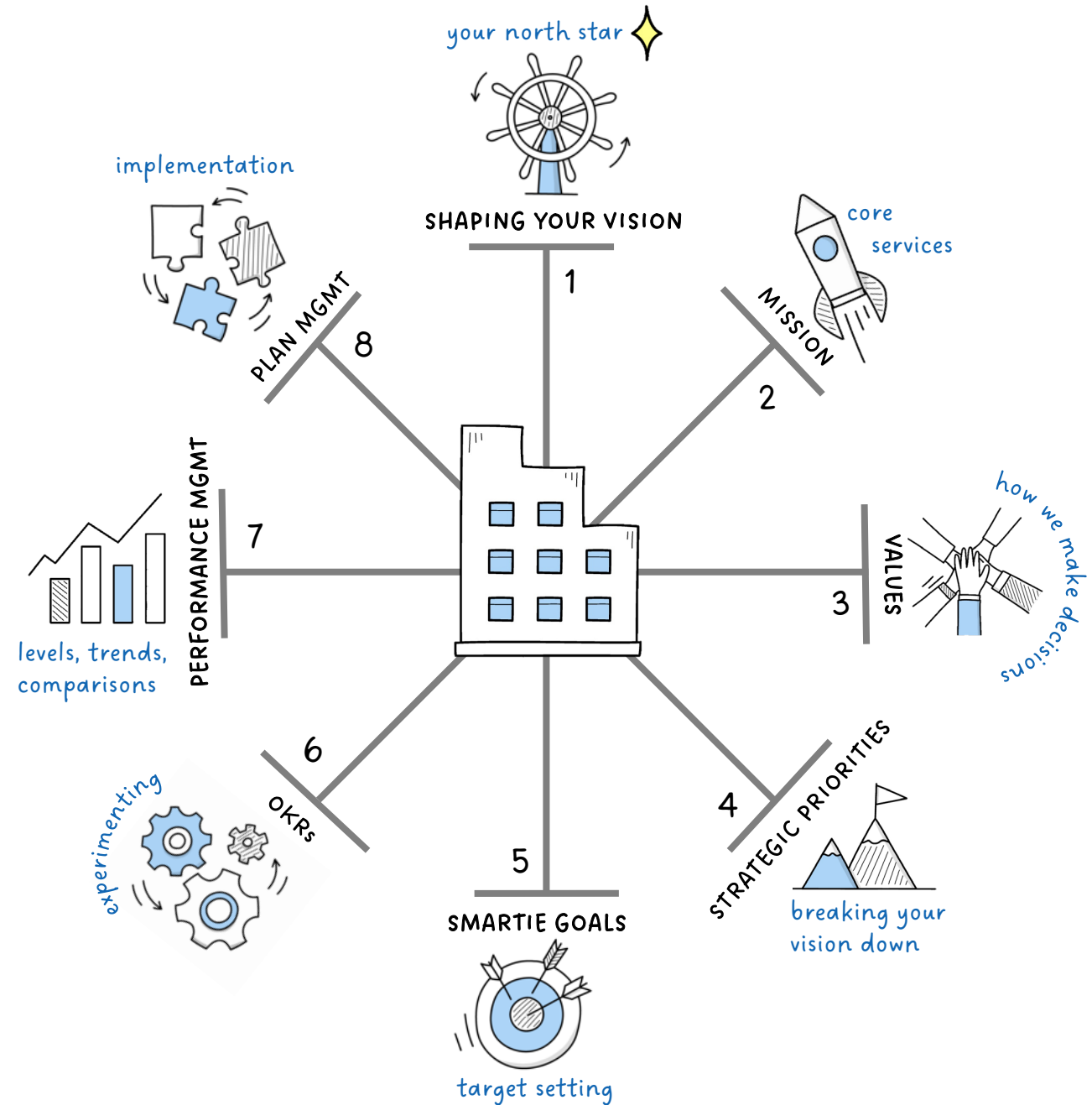


# STRATEGIC PLANNING

Lean Community of Practice 11/2022

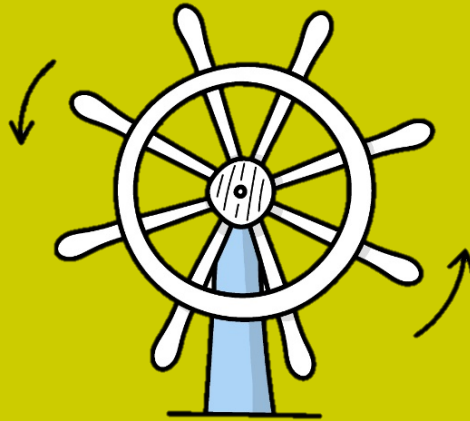


# STRATEGIC PLAN DEVELOPMENT



# Begin with the **END** in mind

- Steven Covey



Your vision is so much more than just a statement. It's your opportunity to think big about what's possible, to articulate why your work matters, and define how the future will be different if you succeed in your efforts.



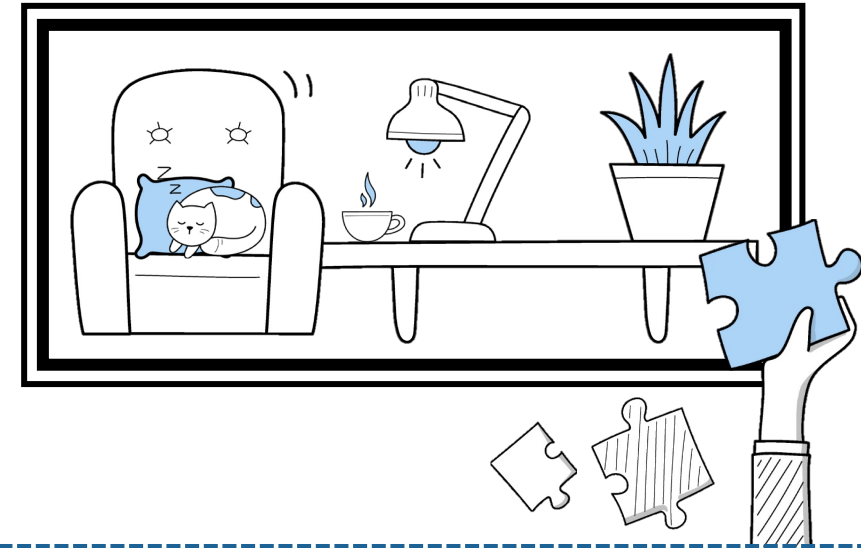
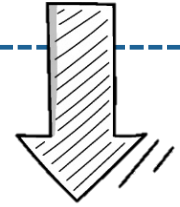
“Your vision statement needs to provide a clear picture of your future state.”

Developing a vision should be the **FIRST STEP** in your strategic planning process!

VISION

A world with FREE access to all human knowledge.

Like the picture on a puzzle box



Developing a vision statement may be the most transformational part of strategic planning.

# Visioning How To:

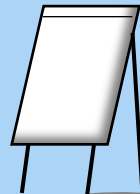
- 1 Get the right people involved
- 2 Use visioning exercises to get wheels turning
- 3 Draft collaboratively
- 4 Get feedback
- 5 Fine tune

## VISION FORMAT:

ORGANIZATION NAME envisions a world where  
DESCRIPTION OF WHAT THINGS WOULD LOOK LIKE  
OF YOU ACHIEVED ALL YOUR GOALS.

## FACILITATION TIP

- ✓ Don't wordsmith in a group. Ask your comms staff, or your best writer, to draft some statements for review.



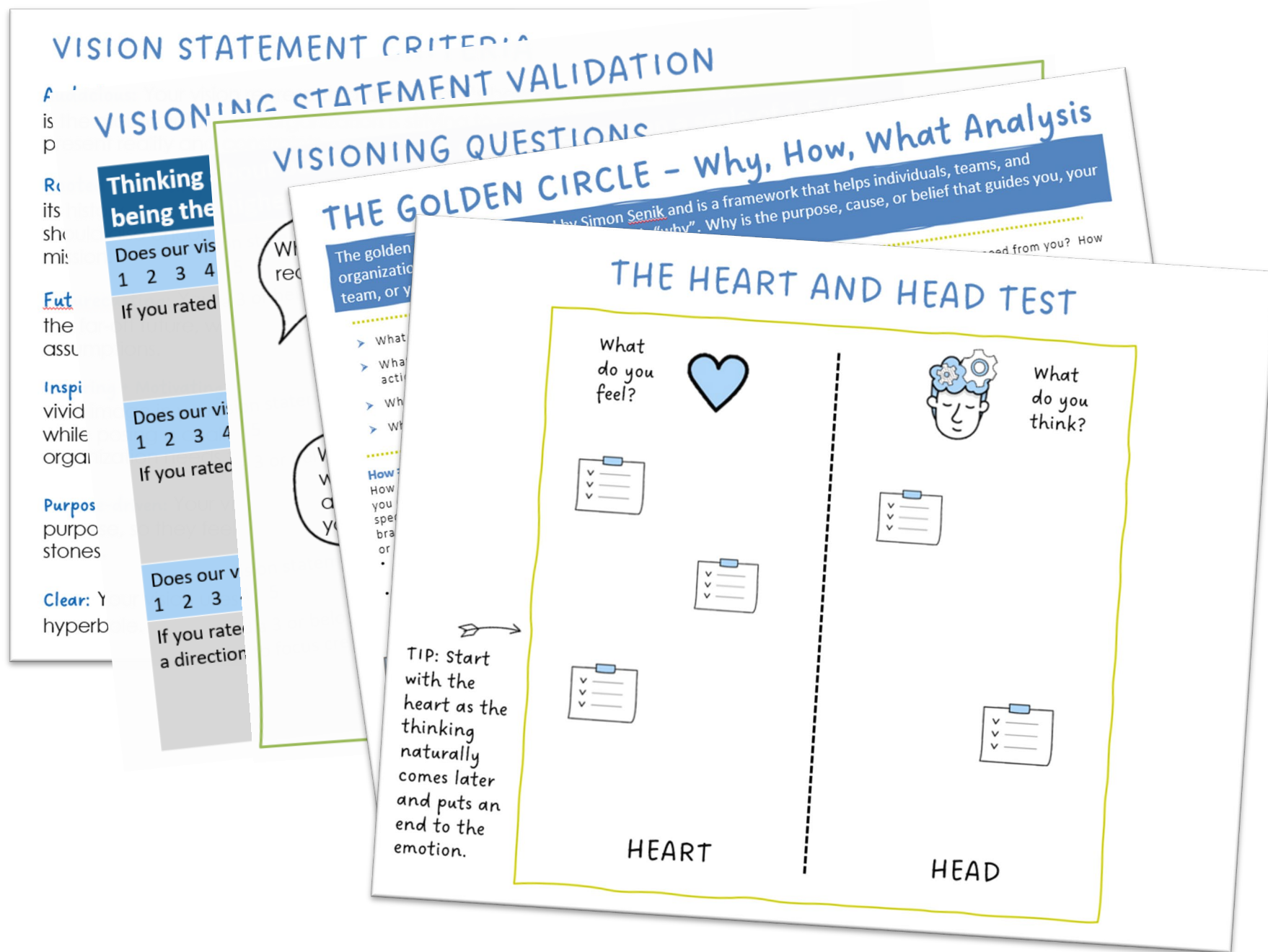
## INVOLVE:

- Leadership
- Communications dept.
- Representative group of staff
- External stakeholders

## EXERCISES

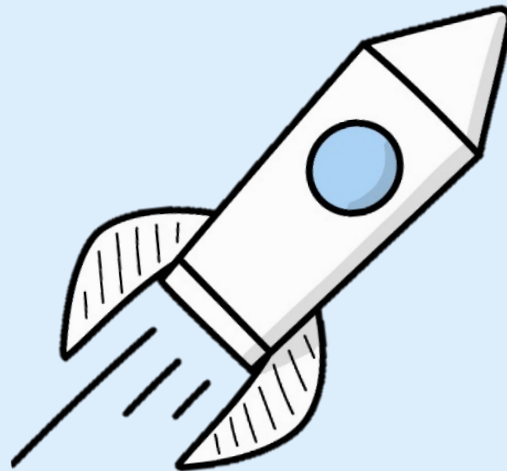
- **Likes and Dislikes:** Gather a list of 5-10 example vision statements. Then ask your group to consider these examples and articulate what they like and dislike about them.
- **Hopeful Headline:** Ask participants about how an ideal news headline regarding your organization would read 50 years from now. What do you want to be newsworthy about your organization? What goals would you like to achieve?
- **Wicked Questions:** Ask a series of visioning questions, pull out common words/themes and then mold into your vision statement.

# TEMPLATES





If you desire to make a  
DIFFERENCE in the world, you  
must be DIFFERENT from the  
world. *Elain S. Dalton*



“Your mission statement is the scope statement of your strategic plan.”



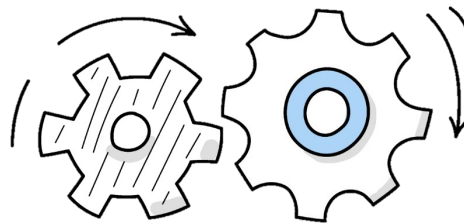
A mission statement is the work you do everyday to drive towards your vision.

When have we seen our mission in action?

A vision statement describes *WHY* while a mission statement describes *HOW*.

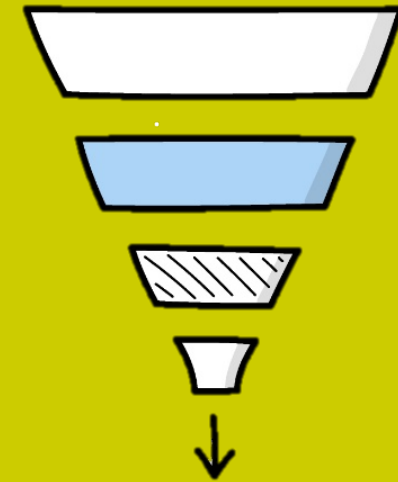


A mission statement operates in tandem with your vision statement



A mission statement is usually developed after a vision statement.

WHAT ARE OUR PRODUCTS OR SERVICES? WHO DO WE DO IT FOR? HOW DO WE MAKE A DIFFERENCE?



**MISSION**



# Mission Statement How To:

## OUR BEST WORK

Ask participants to write a short paragraph explaining what it looks like when your organization is doing its best work. Paint a picture of that ideal day: who is doing what, what sort of impact is their work making, and how does it feel?

Our Cause  
Who? What? Where?



Our Actions  
What We Do



Our Impact  
Changes For  
the Better

1

Look at the stories you've written down as a group, identify every time you mention a specific place or person, circle them so you can identify them later.

2

Now draw a square around any mention of your organization making a difference and taking action.

3

Finally, underline any time something in the story changes for the better or results from your work.

4

Each of these themes should make it into your mission statement in some way.

## MISSION FORMAT:

ORGANIZATION NAME is on a mission to  
MEASURABLE OUTCOMES by HOW YOU DO IT, for  
WHO YOU SERVE.

## FACILITATION TIP

- ✓ Try drafting mission statements using the format above individually. Then compare your drafts as a group, see what words and concepts come up often and continue to refine.



# TEMPLATES

## MISSION STATEMENT CRITERIA

Based on core c  
just its future as

**Realistic:** it ca

**Focused on th**  
future.

**Tactical:** it f  
your vision)

**Unique:** wh  
same miss

**Specific:** i  
uncertain

## MISSION STATEMENT VALIDATION

### Thinking being the

Defines what  
1 2 3 4

If you rated a

Staff can see h  
1 2 3 4

If you rated a 3

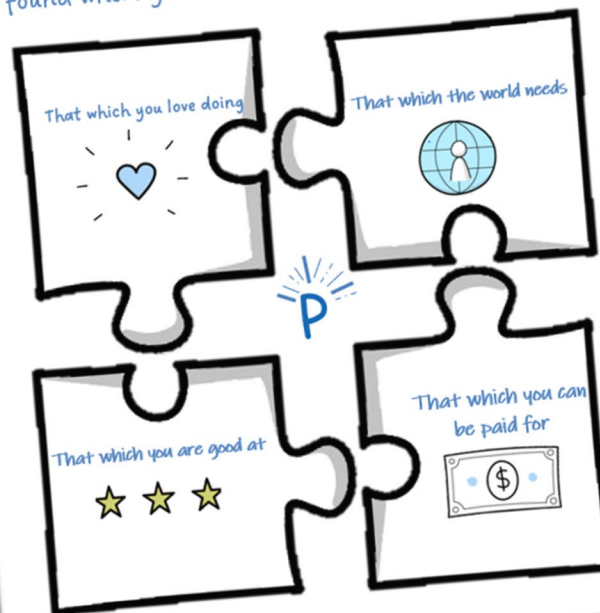
Does our mission  
1 2 3 4 5

If you rated a 3

## MISSION DEVELOPMENT TEMPLATE

This exercise helps identify the key elements that your mission statement should contain. It helps to drive innovation which is a critical factor for your organization in retaining talent.

The purpose of you or your organization can be found where your answers to all four questions meet.



### HOW TO USE THIS TEMPLATE

1. Start by working out answers to the 4 different questions in the separate boxes.
2. Next identify the themes that emerge between each box
3. Lastly, review the themes from the intersections and draw out your purpose

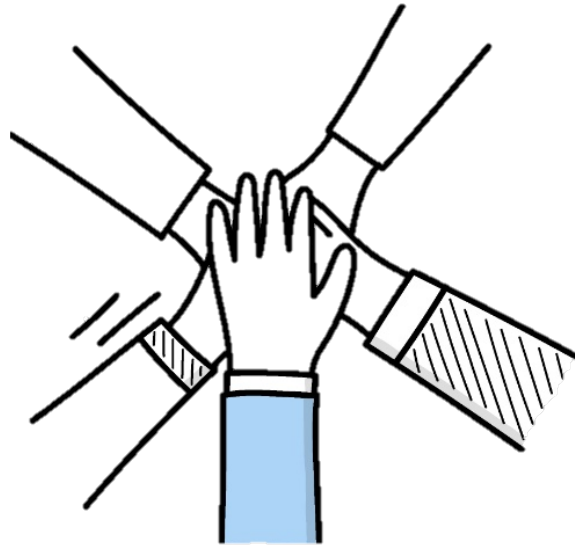
### FACILITATION TIPS

- ✓ Don't wordsmith in a group. Ask your best writer to draft some statements to review.
- ✓ Use a whiteboard (Teams, Mural, Miro) and have participants answer each of the four questions individually by putting their responses on virtual sticky notes for each question. Then collaborate as a team on what themes emerge



# Culture eats strategy for breakfast.

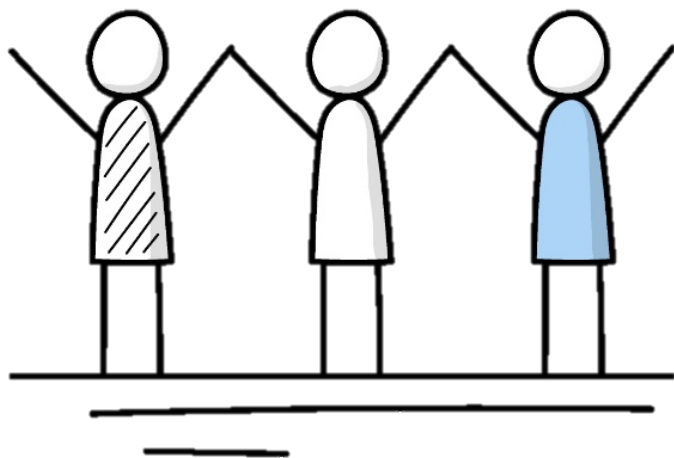
- Peter Drucker





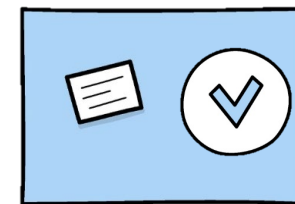
“ True culture change is identity change ”

# VALUES



- define what you stand for and guide behavior.

Every action you take is a vote for the organization you wish to become.



How are you different from other organizations?



How do you create relationships with your customers, clients and stakeholders?



What behaviors do you need to reach your future state?

Use Values To:

- ✓ Make decisions
- ✓ When hiring new staff
- ✓ In evaluating Programs & Services

# Values How To:

- 1 Think about the important decisions your organization will need to make to reach your vision.
- 2 List the top 3-5 values you will need to rely on to make those decisions.
- 3 Share as a group and tally responses that are mentioned more than once.
- 4 Categorize the words into themes.

## VALUE FORMAT:

VALUE: We ACTION WORD/VERB - definition.

“ INSTITUTIONALIZING YOUR VALUES IS HOW YOU SHAPE MISSION-ALIGNED BEHAVIORS AND DECISION MAKING AT YOUR ORGANIZATION! ”

### NOTE 1:

Limit your values to no more than five.

### NOTE 2:

Avoid combining values. Ex: Honesty and Integrity.

### NOTE 3:

Don't use the value word in the value definition.

Example: Our values are...

**Courage:** We invite risk and investment from all our partners in order to aspire, strive, and succeed.

**Accountability:** We drive impact, work in collaboration, and deliver meaningful outcomes with honesty, fairness and transparency.

**Transformation:** We foster curiosity, energy, innovation, and growth in a safe and affirming environment.

# CULTURE CHANGE MODEL

Example: Building a Culture of INNOVATION

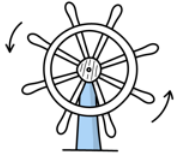
Keep	Remove	Grow
<b>Belief</b> We are creative	<b>Belief</b> We are risk averse	<b>Belief</b> We are willing to take intelligent risk
<b>Behavior</b> Staff provide out of the box ideas	<b>Behavior</b> We say "we can't do that"	<b>Behavior</b> We take all ideas seriously
<b>Action</b> Create an idea board for staff to submit their ideas	<b>Action</b> Stop shutting down ideas	<b>Action</b> We have an unbiased process to evaluate all ideas



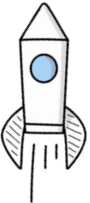
Culture is a set of beliefs  
 Beliefs drive behaviors  
 Behaviors are reinforced by actions



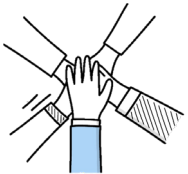
# TO TRANSLATE YOUR VISION, MISSION, AND VALUES FROM CONCEPTS INTO PRACTICE ASK THESE FOUR QUESTIONS.



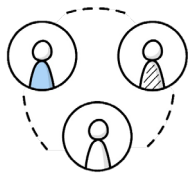
Is what I am doing right now bringing us closer to our vision?



Is what I am doing right now consistent with our mission?



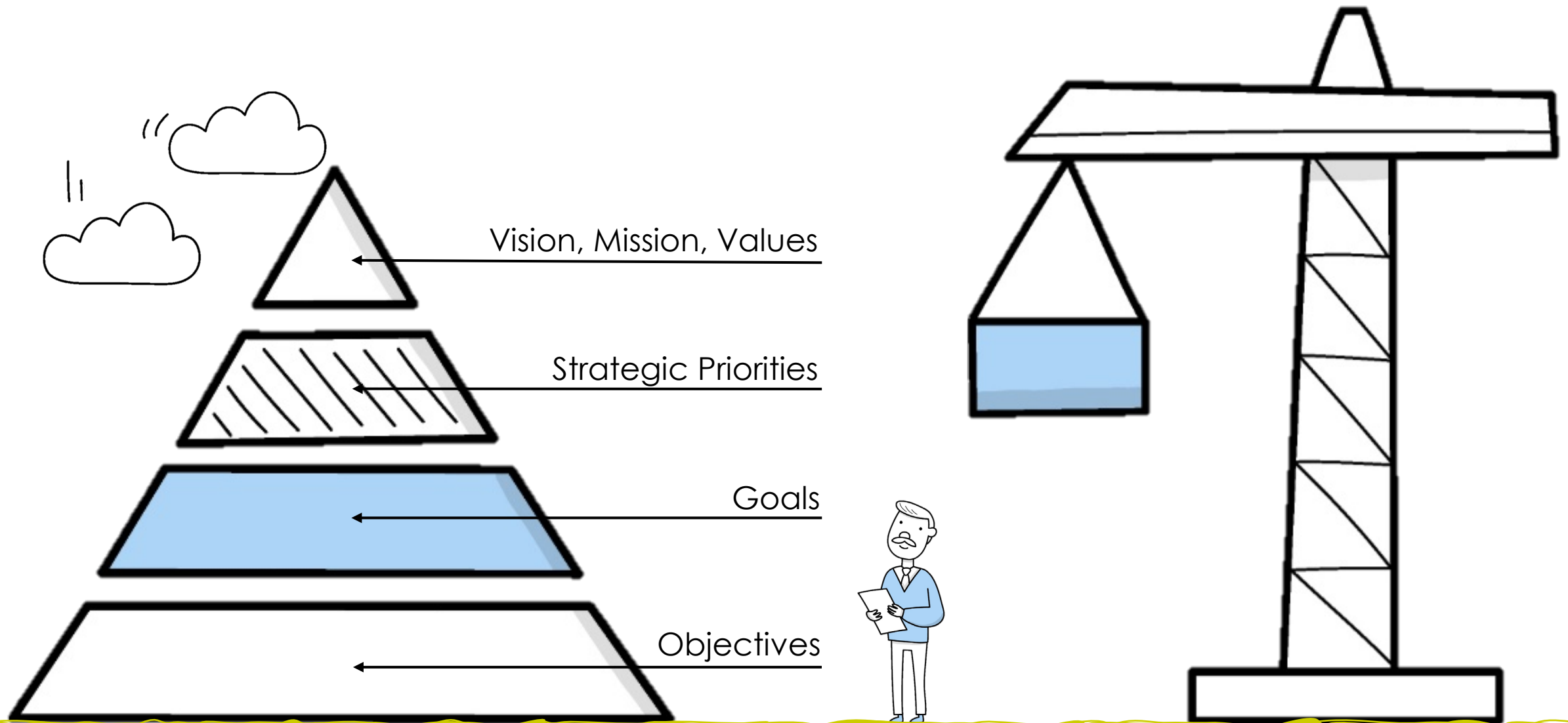
Is what I am doing right now honoring our values?



Is what I am doing right now delighting our customers?

Affirmative answers to these questions provide point-of-service clarity in converting the concepts into reality. No longer just words on a piece of paper, the mission, vision, and values become an integral part of determining what we do and how we do it.

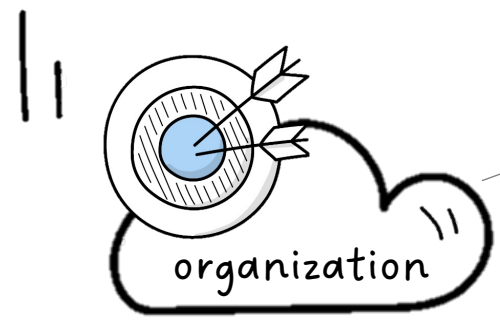
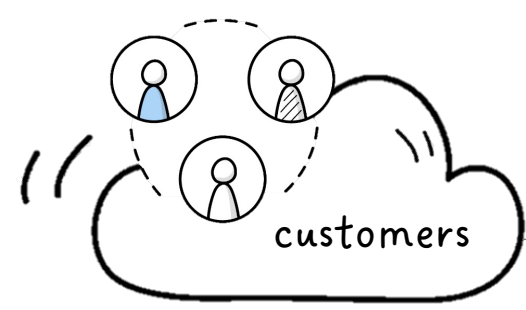
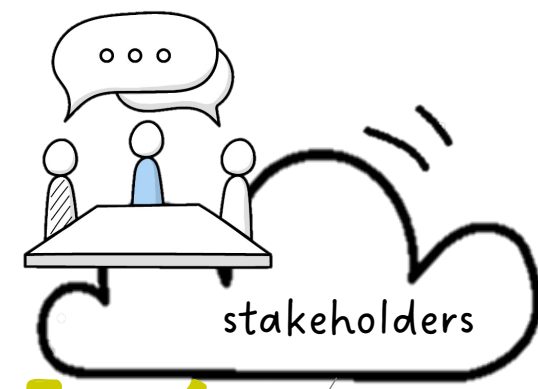
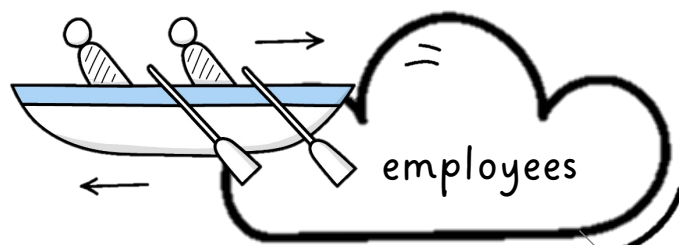
# STRATEGIC PLANNING ARCHITECTURE



If you fail to plan, you plan to fail. Strategy tells the tale.

- Taylor Swift





# Strategic Priorities How To:

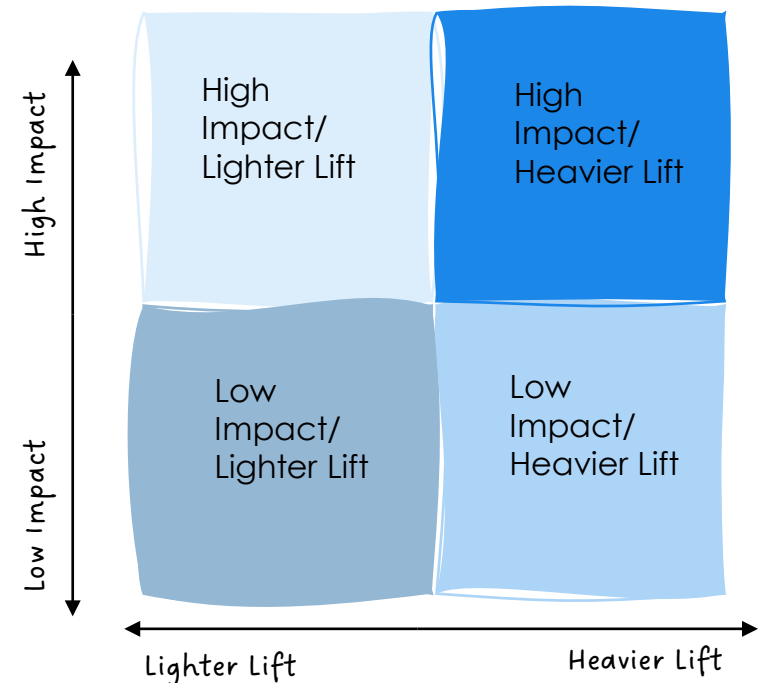
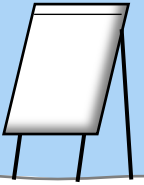
- 1 Involve leadership, a representative group of staff and external stakeholders in identifying priorities and strategic challenges.
- 2 Once input has been captured, begin the process of choosing priorities by brainstorming a list of all the big, strategic questions your organization or team needs to answer in your planning horizon.
- 3 Then organize those questions into categories or themes by grouping related questions together.
- 4 Pull out the 3-5 big picture themes that your plan needs to focus on.

## NOTE:

You should have no more than 5 strategic priorities. Any more than that and you will end up overwhelmed and unfocused.

## FACILITATION TIP







- ✓ If your priorities are not immediately apparent, you can use a tool like a PICK chart to help you narrow your categories down to 3-4.



# TEMPLATE

This template helps you visualize all of your strategic priorities as if you have already achieved them. Thinking about your organization and operations - what problems have you solved?

IMAGINE it's 5 years from today... ↓

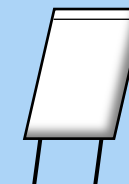
 <p>How are staff behaving differently?</p>	 <p>What relationships have you built?</p>	 <p>How do you now serve customers?</p>
 <p>What are people saying about you?</p>	 <p>What problems have been solved?</p>	 <p>What specific improvements have been made?</p>

## WAYS TO USE THIS TEMPLATE:

1. You can use this template to establish priorities for any of these six areas. Starting with your vision, answer the questions with the intent of "how" your statement would help you reach your vision.
2. You can use this template to create your individual, team, or organizational purpose or vision by answering these questions and then distilling down the responses to overarching themes. Next, create a vision summary statement.

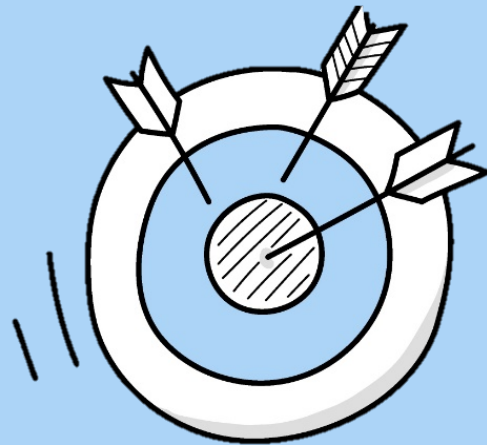
## FACILITATION TIPS

- ✓ Don't wordsmith in a group. Ask your best writer to draft some statements to review.
- ✓ Run this exercise using the Liberating Structures 2-4-All exercise.





It's not how smart you are that matters, what really counts is HOW you are SMART. *Howard Gardner*



S Specific



Is it clear what I want to do and accomplish?

M Measurable



How do I know that I have achieved it?

A Attainable



Do I see myself doing it? Can I break it into manageable pieces?

R Relative



Is the goal achievable or too hard/easy?

T Timebound



What is my target date?

I Inclusive

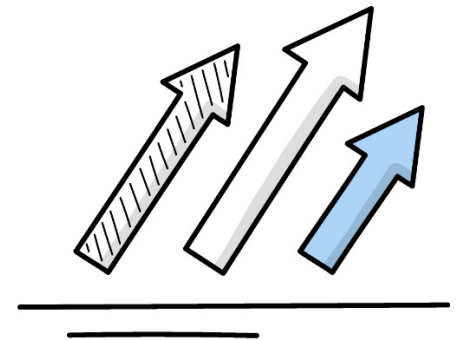


Does it bring traditionally marginalized people into activities and decision making in a way that shares power?

E Equitable

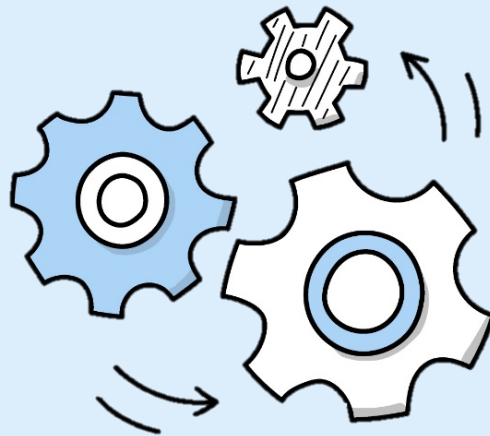


Does this address systemic injustice, inequity or oppression?



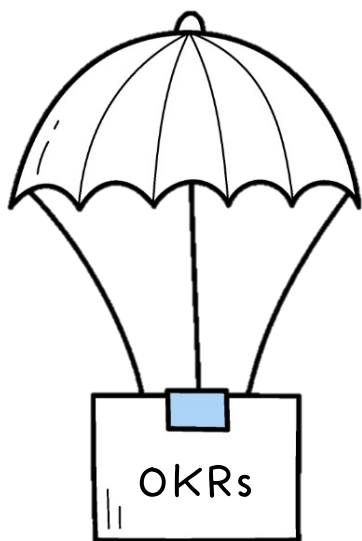
Having lost sight of our objectives,  
we redoubled our efforts.

*Walt Kelly*



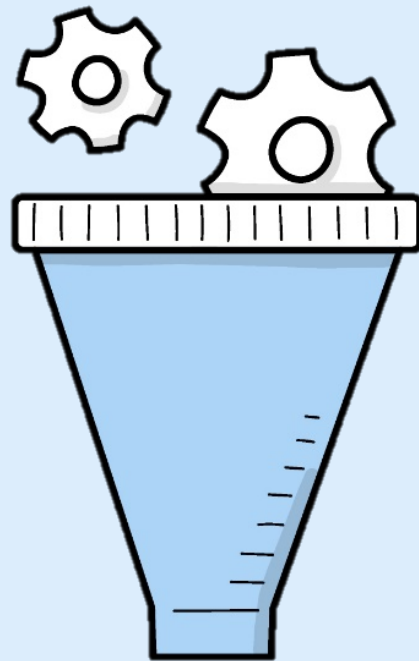
“

Objectives are your hypothesis on what you think will make a difference. ”

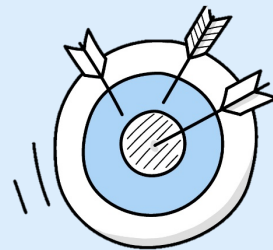


Establishing objectives and key results is where your plan starts to take off!

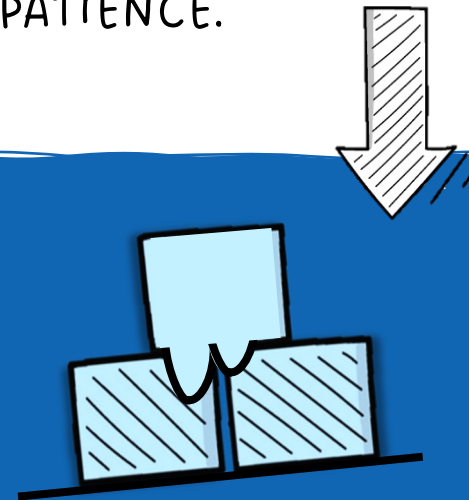
# OBJECTIVES



## RESULTS



The most overlooked & underappreciated growth strategy is PATIENCE.

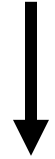


Consider what it takes to bring water from a frozen state to a liquid state. If we start at 0 degrees, we must increase the temperature to 33 degrees before we see our efforts achieve results.

# Objectives How To:

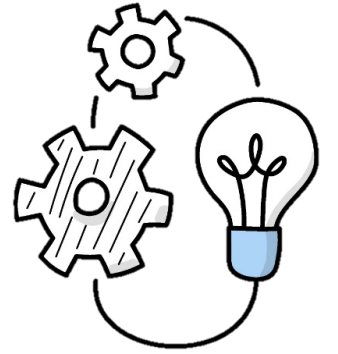


Together,  
**OBJECTIVES** and  
**KEY RESULTS** are  
often called OKRs



Objectives should be **AMBITIOUS**,  
**MEMORABLE**, and **MISSION ALIGNED**.

- 1 Brainstorm a list of all the things you feel your organization needs to accomplish in the next 1-2 years under each priority.
- 2 Evaluate and prioritize your ideas for each strategic priority together. You could use a feasibility and impact chart or a prioritization matrix.
- 3 Narrow your list down to the 3-4 absolute most important things you need to accomplish under each priority. These will become your objectives.



Every system is  
perfectly designed  
to get the results  
it gets.

## Key Results How To: -----

**Output-oriented key results** describe the key milestones that need to be hit in the process of accomplishing the objective.

**Outcome-oriented key results** describe the measurable change that occurs in the process of working toward the objective.

- 1 What are the 1-5 things we'll need to produce or accomplish in order to make this objective true?
- 2 Have a mix of **OUTPUT**-oriented key results and **OUTCOME**-oriented key results

# TEMPLATE

(Your Organization Here)				
Strategic Anchors	Vision Mission Values      Excellent Customer Service, Innovation, Respect			
Goal (your S.M.A.R.T.I.E.. Goal here)				
Hypothesis: If INSERT S.M.A.R.T.I.E. GOAL HERE we will INSERT OUTCOME HERE (this might be your strategic priority)				
If we do this... (Objective)	Specifically, by...(Output)	As measured by... (Output Measure)	Then the outcomes will be...	As measured by.. (Outcome Measure)
EX: Make our website more user friendly	Making our application easier to find on our web site	<ul style="list-style-type: none"><li>10% increase in web traffic from 200 hits in 2022 to 220 hits in 2023</li></ul>	<ul style="list-style-type: none"><li>Increased accessibility to services</li></ul>	<ul style="list-style-type: none"><li>10% increase in service usage</li></ul>
EX: Update our aging system	By hiring 3 new staff to convert our files	<ul style="list-style-type: none"><li>A new system is in place by 3/31/2023</li></ul>	<ul style="list-style-type: none"><li>Staff can do their work faster</li></ul>	<ul style="list-style-type: none"><li>10% increase in processing applications within 2 days.</li></ul>



You don't rise to the level of your goals; you fall to the level of your systems.

*James Clear*



A Approach

D Deployment

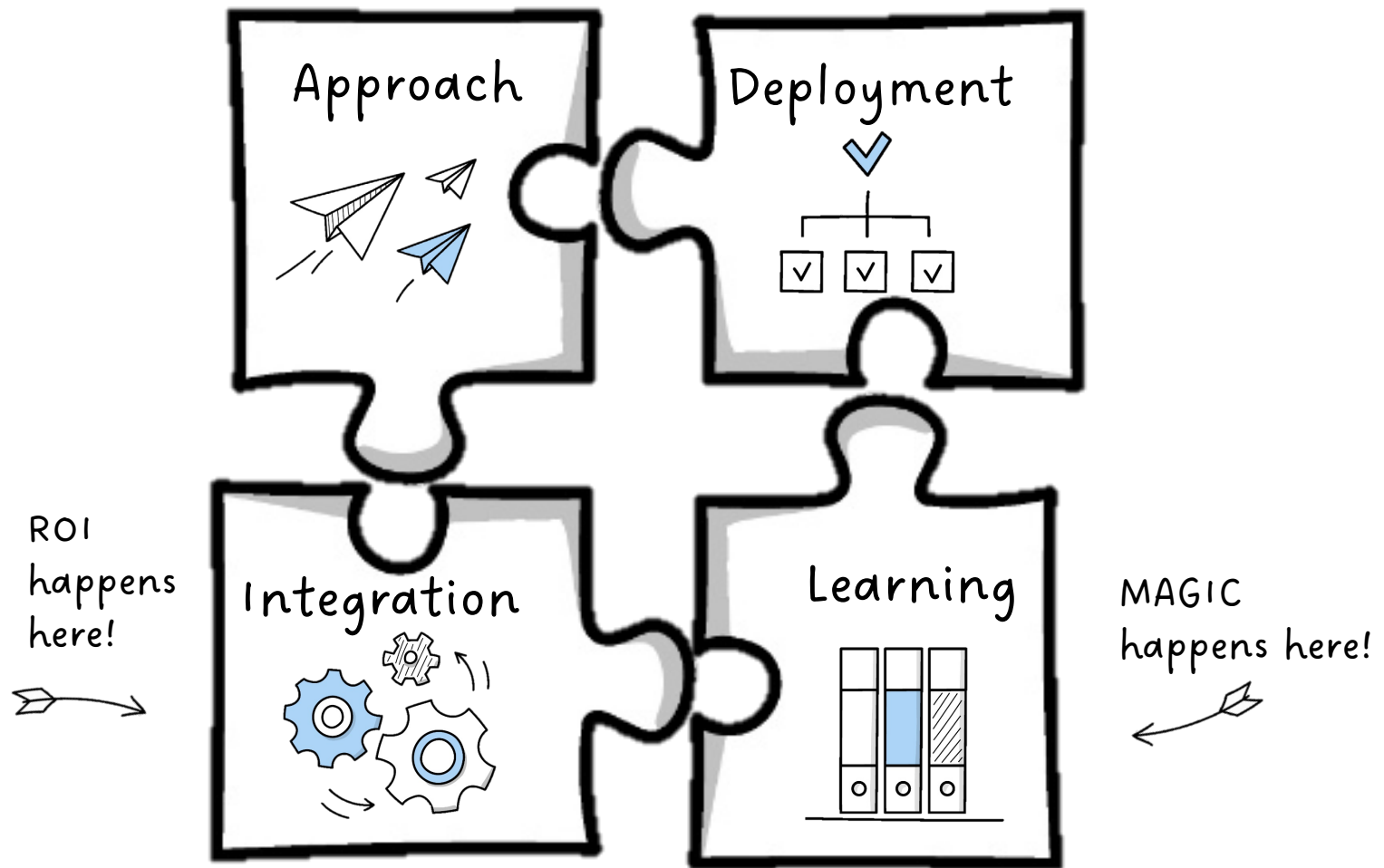
L Learning

I Integration

“To LEARN you must measure!”



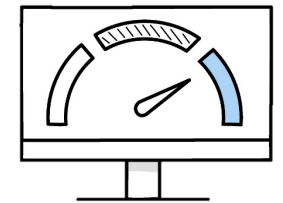
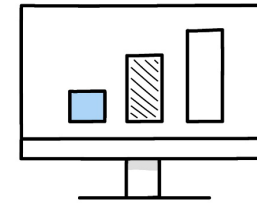
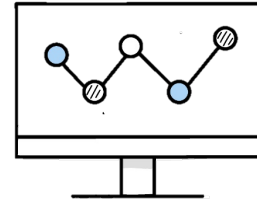
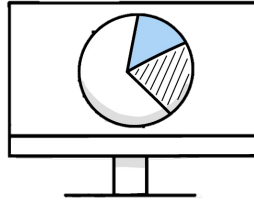
# PERFORMANCE MANAGEMENT



# Performance Management How To:

1 Determine ownership

2 Set-up a dashboard



**Metric:** is the KR **numerical** (ex: grow program participants from 250 to 500) or **percentage-based** (ex: launch a new program, with potential values of 0% complete to 100% complete)

**Measurement frequency:** are we aiming to achieve this KR by the end of the **quarter** or the end of a **year**?

**Target :** what's the amount we're trying to hit related to this KR measure? (ex: 500 program participants or 100% completion)

**Current state:** Where are we at currently in relation to the measure?

**Owner:** who owns this priority, objective or key result?

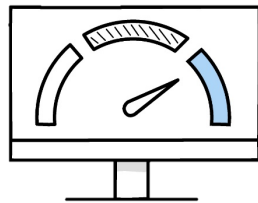
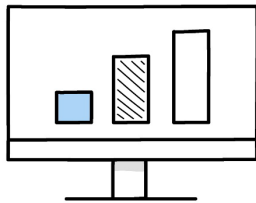
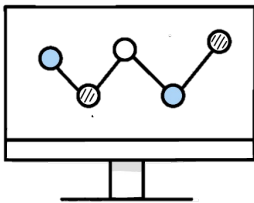
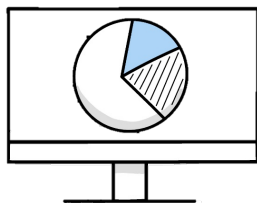
**Progress:** how far along are we toward completing the KR? (0-100%, calculates automatically based on target value and current value)

**Confidence level:** how confident are we that we'll complete this KR based on our progress to date and what we know now? Options include:

- **Completed:** we've achieved the KR
- **On track:** we're likely to complete the KR
- **Off track:** we're unlikely to complete the KR unless something major changes
- **At risk:** we're not totally off track yet, but will be soon
- **Not started:** we haven't started working on this OKR yet because it's slated for a later time in our plan

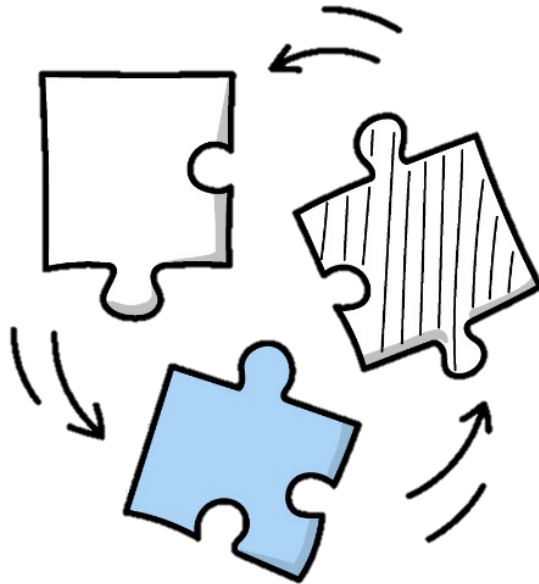
# Performance Dashboard Example

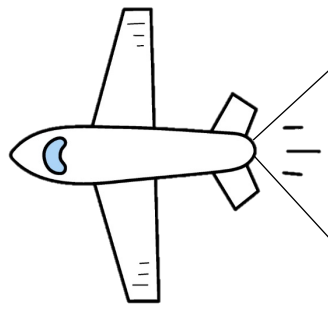
Strategic Priority	Strategic Priority	Strategic Priority	Strategic Priority	Strategic Priority	Objective Measure Target	By When ...	Current measure	As of ....	Data source	Improvement Initiatives	Key Result Target	by when ...	Current status	Change since last review	Contact
Objective 1:															
x	x	x			Less than 7%	9/30/2022				1.1 Initiative	↓ 7%	9/30/23			Tom
										1.1 Initiative	↓ 7%	9/30/23			Julie
										1.3 Initiative	↓ 7%	9/30/23			Jamie
Objective 2:															
x	x	x	x	x	67%	9/30/2023	67.3	9/30/2021		2.1 Initiative	↓ 30 days	12/31/2022			Heidi
										2.2 Initiative	85%	12/31/2022	38.40%	▲ 125%	Brad
Objective 3: Improve Change Navigation															
				x	55%	Next employee survey	50%	4/22/22		3.1 Initiative					Andrew



I love it when a plan comes  
together!

*Col. John "Hannibal" Smith - The A-Team*



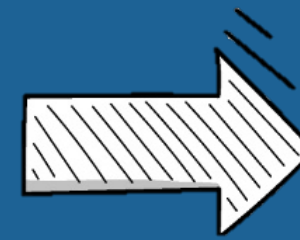


Ask "are we working on the right stuff?", not "what are we working on?"

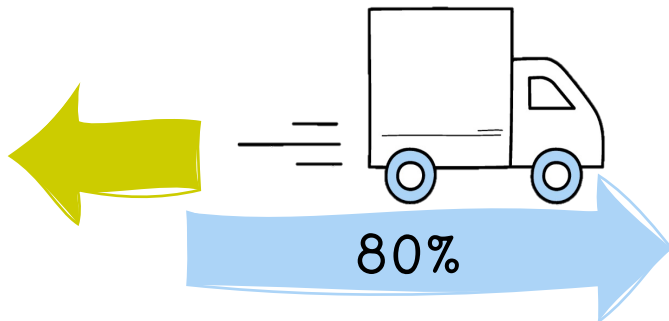
Strategy Review Meetings should stay at the 15,000-foot level.

- Are we on plan and on track w/ performance measures?
- What have we accomplished in the past \_\_ days?
- What are we going to focus on in the next \_\_ days?
- Any help needed or any recommended changes to the goal/strategy?

# PLAN MANAGEMENT



## Strategy Reviews



You should spend 20% of the strategy review looking back and **80%** looking forward.



Strategy Reviews are the **HEARTBEAT** of the strategic management process. Without strategy reviews you do not have a living, breathing plan.



# Plan Management How To:

1

Deploy your plan throughout your organization

- Communicate effectively
- Consider change management needs

2

Strategy review considerations:

- Timing
- Cadence (monthly or quarterly)
- Attendees
- Data (quantitative and qualitative)

3

Create an agenda:

- 3-4 minutes per strategic priority
- Review strategic objectives and progress towards goals.
- Ask “are we making progress?”
- Ask “do we need to adapt our strategy?”
- Ask “is our culture supporting our direction?”

Goals are about the results you want to achieve; SYSTEMS ARE ABOUT THE PROCESSES THAT LEAD TO THOSE RESULTS.

The purpose of setting goals is to win the game. THE PURPOSE OF BUILDING SYSTEMS IS TO CONTINUE PLAYING THE GAME.

Ultimately it is YOUR COMMITMENT TO THE PROCESS that will determine your PROGRESS.

“ Professionals stick to a schedule. Amateurs let life get in the way. ”



## Resources



Visual Thinking by  
Willemien Brand



[Start With 'Why' - TED Talk  
from Simon Sinek - YouTube.](#)



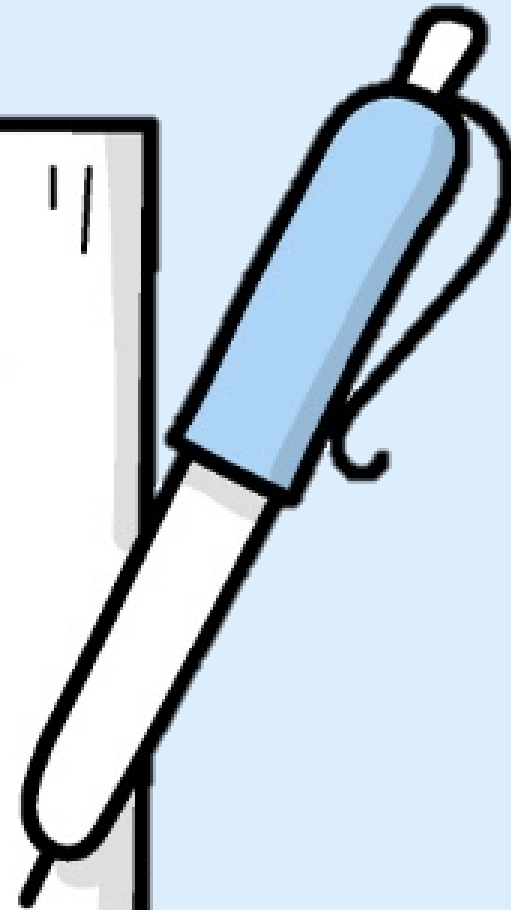
Atomic Habits by  
James Clear



OnStrategy.com



Prosper-strategies.com



# Questions?



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