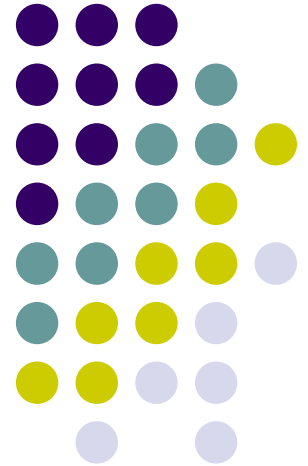


# Assessing Your Current Community Strategy

Cleo Lepori-Costello  
March 14, 2008

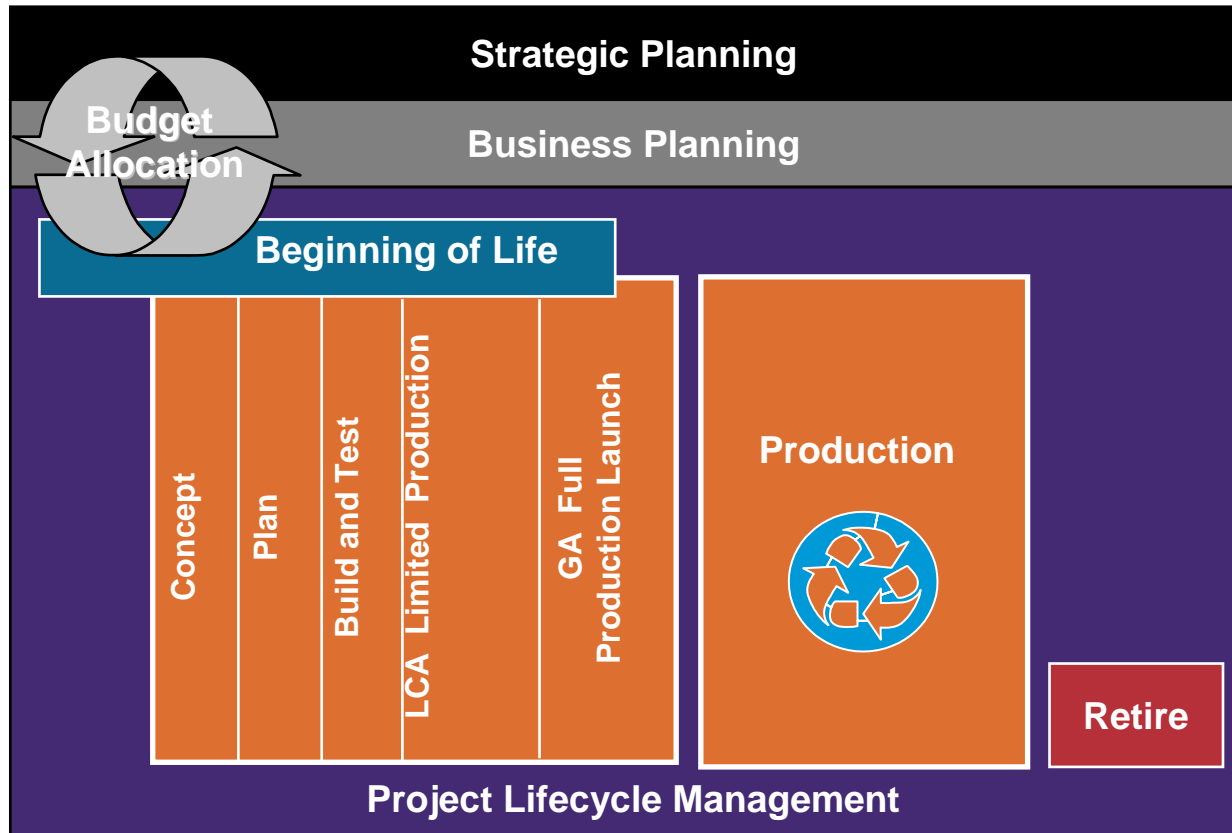


# Objectives



- At the end of this track, you will...
  - Have a basic understanding of the Strategic Planning Process
  - Know a framework to assist in your efforts and a tool to more effectively manage expectations
  - Have gone through the steps of creating mission and vision statements
  - Know where to go next for further assistance and other available resources

# Converting Strategy into Action



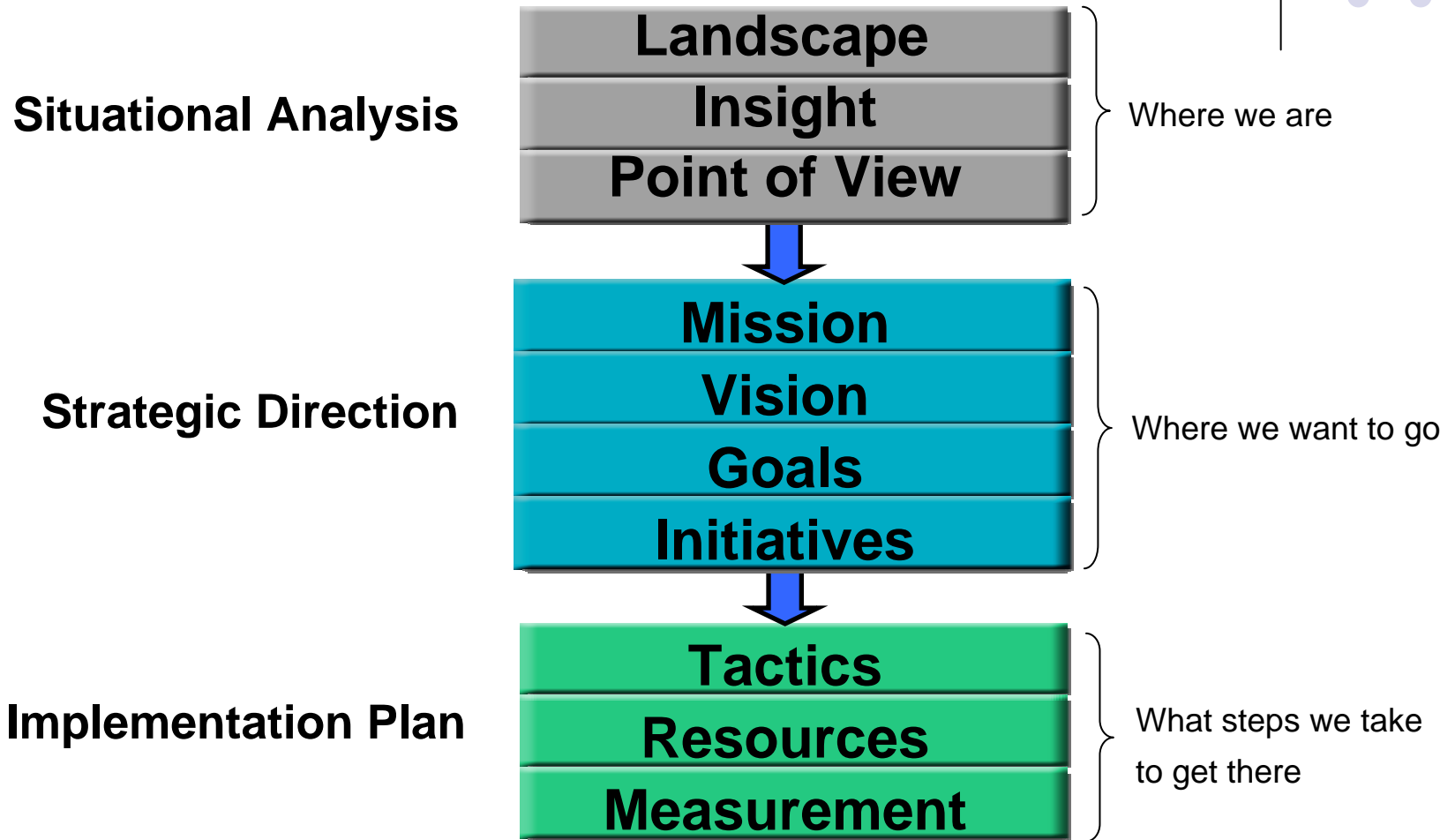


# Executive Overview

- A Strategic Plan tells us
  - Where we are
  - Where we want to go
  - What steps we take to get there
- An organization's strategy describes how it intends to create value for its shareholders, customers, and employees \*

(\*) Source = *Strategy Maps by Kaplan and Norton.*

# Strategy Framework

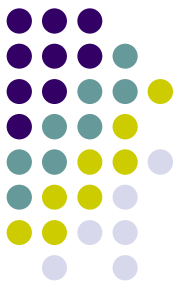




# Situational Analysis



} Where we are

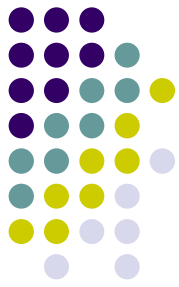
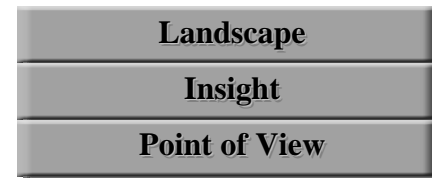


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**“Don’t tell them we failed. Tell them we decided to temporarily postpone our success.”**

# Situation Analysis

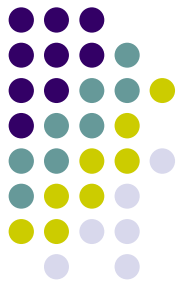


- Foundational understanding of a business's environmental influences upon which its strategy is built in terms of:
  - Markets
  - Customers
  - Competitive Analysis
  - Trends, Opportunities and Threats

Landscape

Insight

Point of View



# A few guidelines

- Consider....
  - Financial perspective
    - If we succeed, how will we look to our shareholders?
    - Improve cost structure
    - Expand opportunities
    - Enhance partners' value
  - Customer perspective
    - To achieve our vision, how must we look?
    - Relationship Management
    - Service attributes
    - Value proposition
    - Quality
    - Availability

Landscape

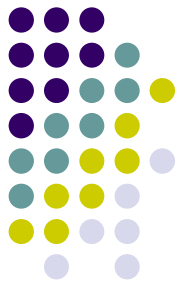
Insight

Point of View



# A few guidelines

- Consider....
  - Internal perspective
    - Which processes we must excel at?
    - Anticipate needs
    - Operations management processes (i.e. risk management)
    - Innovation processes
  - Learning and growth perspective
    - To achieve our vision, how must our organization learn and improve?
    - Human capital
    - Information capital
    - Leadership, culture, alignment, teamwork

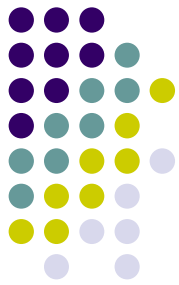


**Strategic Direction**



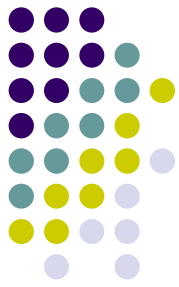
} Where we want to go

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**“Long range planning isn’t my style.  
I’m a fly-by-the-seat-of-your-pants kind of guy.”**

# Definitions



## **Mission**

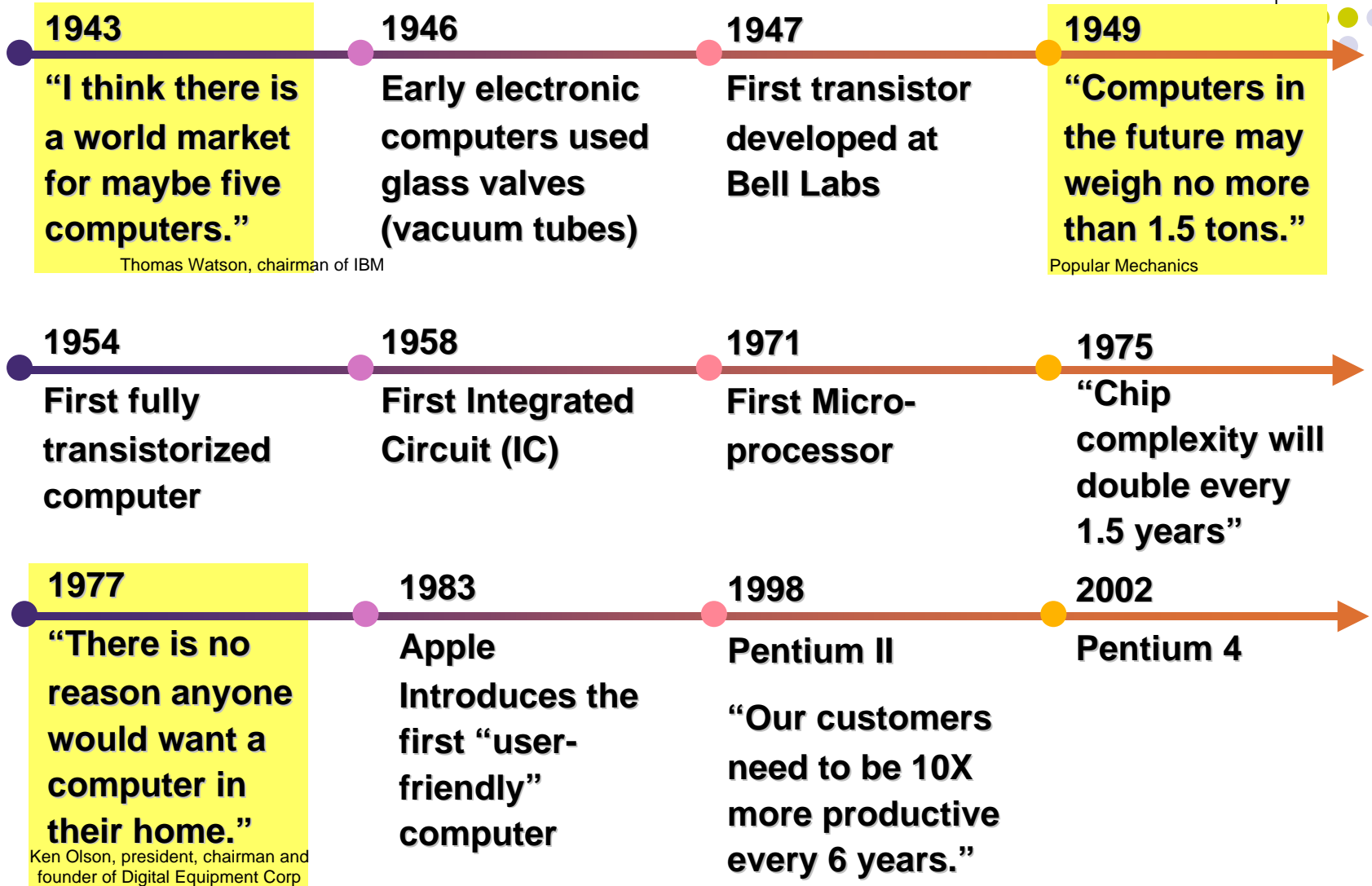
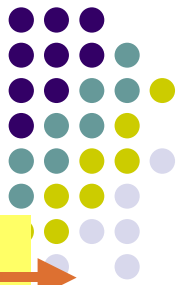
What is the purpose of the specific initiative? The "mission" statement either builds on the mission provided by the company, or is business unit/functionally specific. Explicitly state who the customers are and what differentiated value we bring to them.

## **Vision**

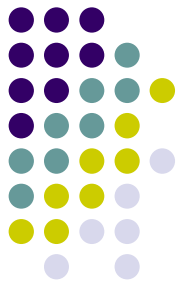
A vision is a detailed image of the future state. It tells the "story" of the winning state. A statement that is focused on some end goal. Explicitly state the main direction and market opportunity for the initiative.

# Bad examples...

|             |
|-------------|
| Mission     |
| Vision      |
| Goals       |
| Initiatives |



# Definitions Cont'



## Goals

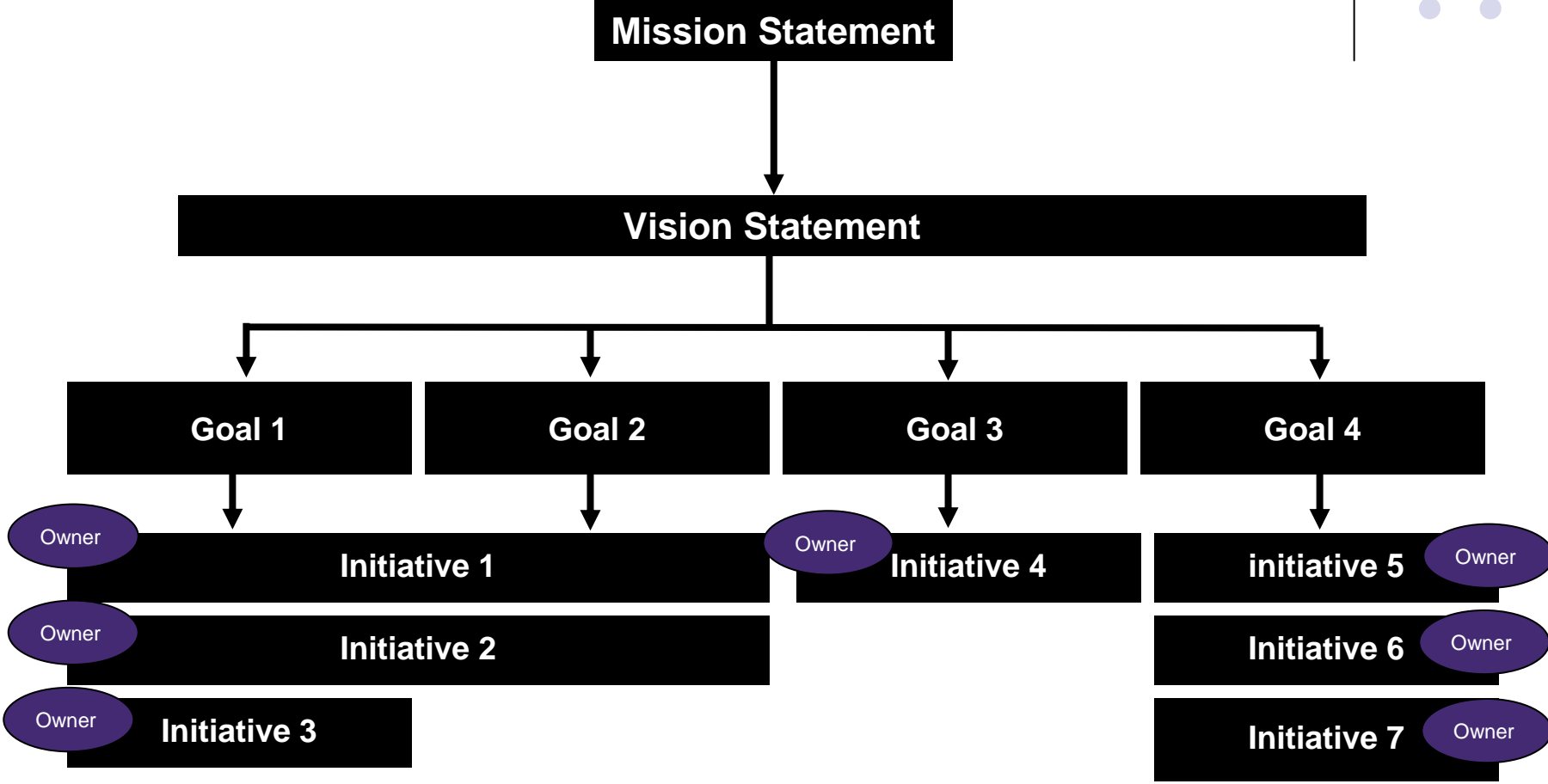
The balanced set of goals which lead to achieving the vision. Consider customer, innovation, financial, and employee. How do we know when we have won?

## Initiatives

Developed to ensure alignment of the product or service offerings to the new strategic direction. These become your MBOs.

# One Pager Template

|             |
|-------------|
| Mission     |
| Vision      |
| Goals       |
| Initiatives |



# Community & Gov. Affairs - Sample



## Mission

Synopsys recognizes that our long term success is directly linked to the well-being of the global economy and the people in it. By actively partnering with local organizations, encouraging employee leadership, and providing financial donations, we help improve the quality of life and economic vitality of our community.

## Vision

At Synopsys we aspire to develop the next generation of technology and its leaders around the world. To that end, we hope to make a lasting and measurable difference in the fields we know best.

## Goal

Donate \$xxM to science and math education programs thru. *xx date* to engage xxxK students

Develop x to y advocacy positions by *x date* to formalize program

Utilize Employee Leadership aligned w/HR- offer x new programs by *x date*

Identify x large donations in key offices for global branding

## Initiative

Update all donation guidelines

Evaluate program donations to ensure goals are being met

Create messaging for Global Citizenship and year end scorecard

Increase citizenship promotion internally and externally and share accomplishments

Create new programs proposal and ROI on employee leadership

Modify grant program to search for programs

Work closer with NGO's, local offices for global donations

Work with internal/external stakeholders to ensure citizenship goals are being met

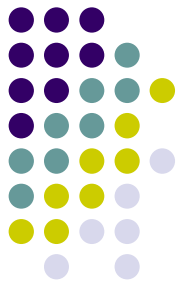


## Implementation Plan



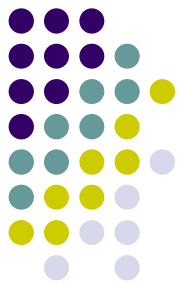
What steps we take  
to get there

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**“This project is extremely important, but it has no budget, no guidelines, no support staff and it’s due tomorrow morning. At last, here’s your chance to really impress everyone!”**

# Definitions



## **Tactics**

Analyze and present specific solution requirements - address how these solutions requirements are driving specific requirements and recommendations

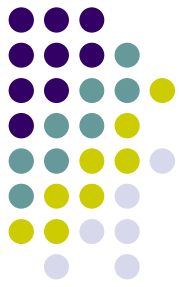
## **Resources**

Organizational alignment - Design of the new organization required to deliver the initiative. It includes the elements of structure, leadership, people, and culture.

## **Measurement**

Metrics are the leading indicators of conformance to goal attainment. They must be clearly defined, and provide milestones to measure progress.

# Practice time...

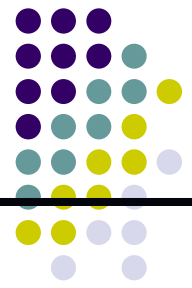


- Review Slides 27-39
- Follow instructions on slides 34 and 35
- Complete template on next page

# Community Strategy



Date



MISSION

VISION

GOALS

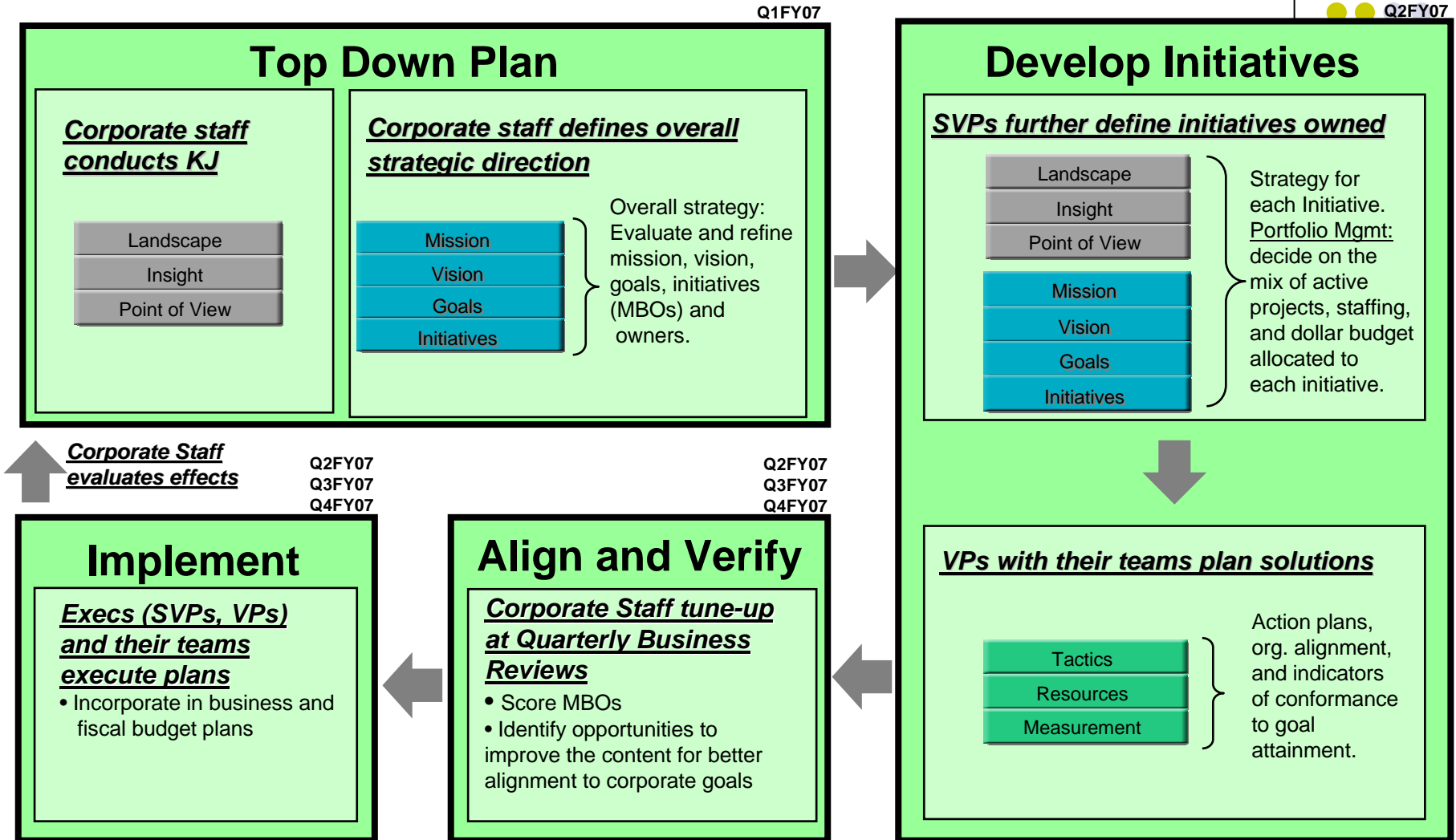
FY 08 INITIATIVES

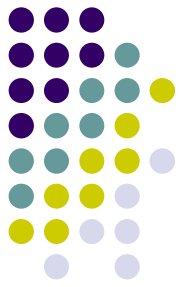
# Summary



- Primary corporate alignment tool
  - Top-down cascading process
- Achieves consensus on a complete set of clear, consistent, coherent, coordinated, medium to long-term decisions about the company's scope and method of competition
- Must be linked and aligned to budgets, measurements and incentives for the rubber to meet the road instead of the sky

# Strategic Planning Process

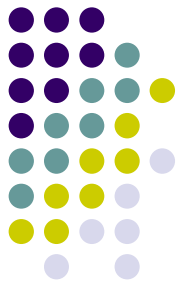




# Resources

- Stanford University Professional Development
  - Converting Strategy into Action
  - <http://apm.stanford.edu/>
- Free Management Library
  - Strategic Planning (in nonprofit or for-profit organizations)
  - [http://www.managementhelp.org/plan\\_dec/str\\_plan/str\\_plan.htm](http://www.managementhelp.org/plan_dec/str_plan/str_plan.htm)
- Recommended reading
  - Bradford, Robert W., Duncan, Peter J., Tarcy, Brian, *Simplified Strategic Planning: A No-Nonsense Guide for Busy People Who Want Results Fast!*

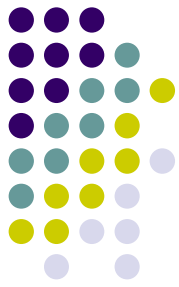
# Appendix



Landscape

Insight

Point of View



# Landscape

- Each person reporting to you or in your team should prepare 1-3 slides with the following information on their area of expertise
  - Capture present status
  - Identify issues
  - Show trends
- Have a roundtable discussion to review the various landscapes
- The objective is to establish a common understanding for the issues and successes in your organization

Landscape

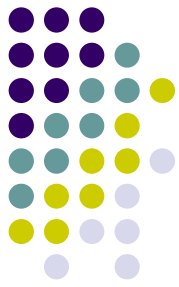
Insight

Point of View



# Insights

- Read the handout called Affinity Diagram (also called the KJ method).
- Proposed key issue under discussion to help you in defining strategic priorities:
  - What prevents <logo> from delivering an effective community strategy that drives for the donation of materials and resources to charities in the places where we do business and where our employees live?



# Responses - Examples

- Operational Excellence
  - Foster an environment of leadership at every level
  - Rapid response
  - Lower cost
- Customer Management
  - Keep systems running or quickly implement solutions
  - Exit unprofitable relationships
  - Grow and retain high-value partners
  - Broaden the relationship with....
- Innovation
  - Redefine segmentation
  - Promote risk taking while ensuring accountability
  - Manage portfolio for competitive advantage

Landscape

Insight

Point of View



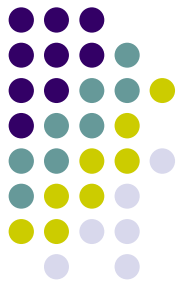
# Insights

- Using Post-Its, each team member writes 5-10 ideas in response to the question – short sentences that can be read 6 feet away
- Each team member participates in sorting all the ideas presented
- For each grouping, a header will be created using consensus
- Each team member will vote on the likelihood that each header idea can be implemented in the next 3-5 years
  
- Outcome: Critical few processes that have the greatest impact

Landscape

Insight

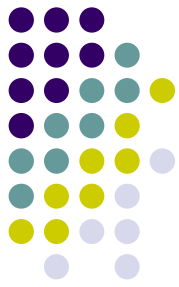
Point of View



# Point of View

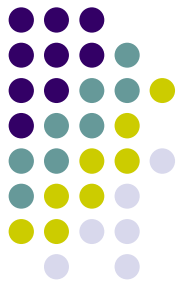
- We will summarize the previous list in 3-5 themes
- These are your standpoints from which assumptions are made to decide on your strategic direction

# Write top goals for next 1-3 yrs



- Consider results from KJ exercise
- Would these address all the issues raised during the landscape roundtable?
  - If not, what's missing and why?

# FY Initiatives

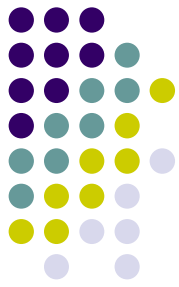


- Outline your key fiscal year initiatives related to each goal
- These are also your MBOs

*MBOs are defined by the goals as measured by  
the initiatives from the Strategic Plan*

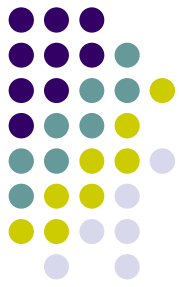
- Assign owners – one owner per initiative

# Write Mission Statement



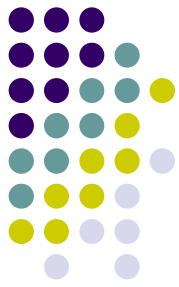
- A Mission statement should be a one-sentence, clear and concise, that says what the initiative is (the name and type of business), what it does, for whom and where. Period.
- Complete all the blanks, and you have quickly created a first draft  
“(Initiative Name) will deliver (describe intention/what problem is the initiative trying to solve) by providing (products or services name) to (beneficiaries of the initiative)”

|             |
|-------------|
| Mission     |
| Vision      |
| Goals       |
| Initiatives |



# Write Vision Statement

- Use a few key words to paint a quick picture of what you believe your initiative will look like in 1, 3, or even 5 years.
- Complete all the blanks, and you have quickly created a first draft  
"Within the next \_\_\_ years grow (initiative name) into a  
\$\_\_\_\_\_million business (type of business) providing  
(description of products/services) to (describe target customer)"



# **Implementation**

**(Done by each initiative owner later)**

# Tactics



- Outline tasks within each initiatives
- Prioritize: essential, strategic, or core
- Consider - How do we implement the tasks to ensure achievement of the vision?

Tactics

Resources

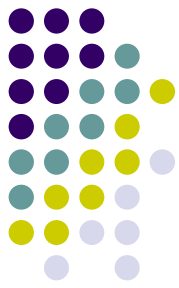
Measurement



# Resources

- Outline what we must look like to deliver our initiatives
- Describe what capabilities we have or require - The critical performance expectations we are required to deliver.

# Metrics



- Define 5 top metrics to be used to measure your success
- Consider:
  - What will we measure(Metrics): definition of success
  - How will we measure (Systems, tools, processes)
  - Who will measure (Resources)
  - How frequently will we measure?
  - Communications plan
  - Corporate resources and collaboration plan
  - IT Project plan to support implementations