

# Our Operating Principles

*When we come together, here is how we operate:*

1

**Give something,  
take something.  
No solicitation.**

2

**Focus on leading  
strategy &  
organization-wide  
impact.**

3

**Confidentiality or  
not. It's your  
choice.**

4

**Keep it positive.  
Be helpful.  
Contribute to the  
greater good.**

5

**Be here.  
We get out of this  
what we put into it.**

# Today's hosts:



**Jeff Brunings**

Head of Growth & Development

Principal Strategist

OnStrategy



**Erica Olsen**

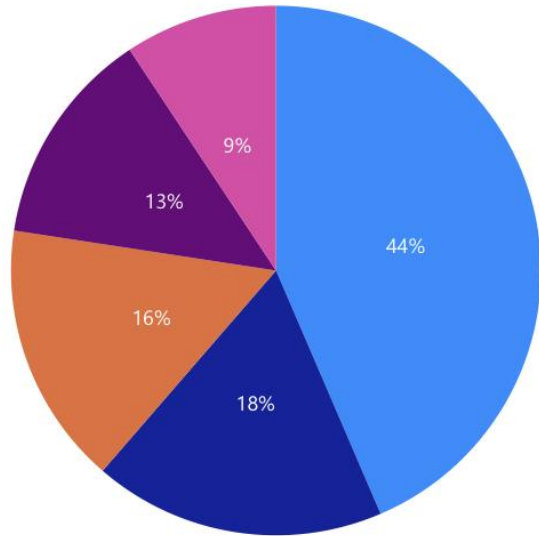
CEO + Co-Founder

Principal Strategist

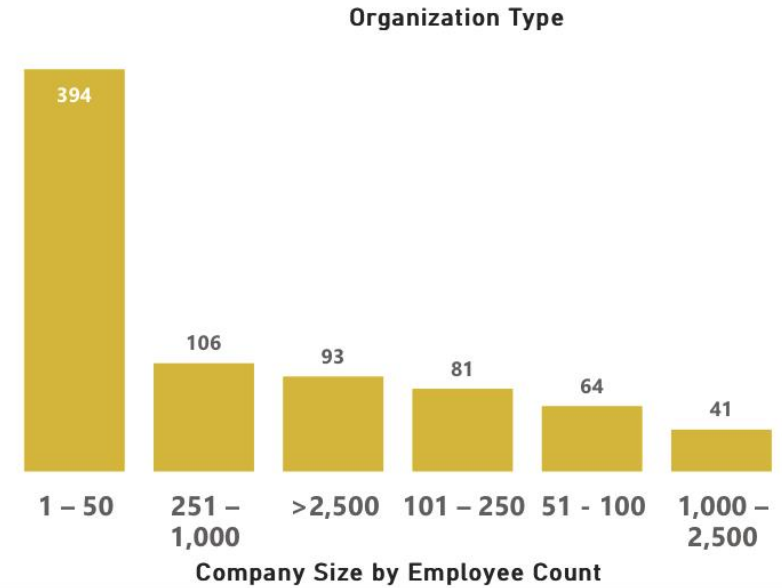
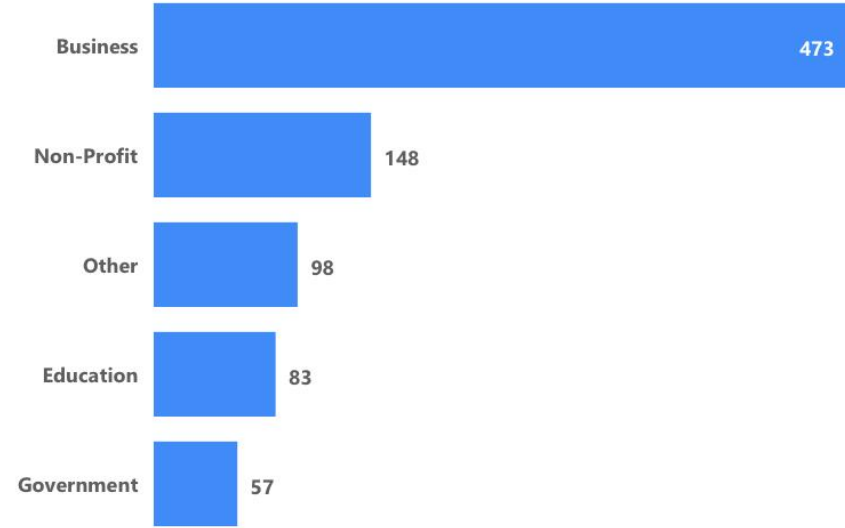
OnStrategy

# A little background to understand your peers and their background!

863



- Executive Leader
- Consultant practitioner working in...
- Aspiring to be a strategy leader
- None of the above
- Newly appointed Leader





**Our Promise: Every session, you'll walk away with one thing you can use.**

## Always Thursdays

1st

### **Deep Dive - General Session**

Masterclass + "From the Field" + Application

2nd  
& 4th

### **Live Roundtable – CSO Pro**

Ask Us Anything Q&A

Dive into your specific questions & share

3rd

### **Workshop a Topic – CSO Pro**

Breakout groups by role and/or sector to share, problem solve with peers.

# Q1 Calendar

*Always*

*Thursdays*

2<sup>nd</sup> @ 8am PT

4<sup>th</sup> @ 8am PT (Jan)

4<sup>th</sup> @ 10am PT (Feb+)

Ask Me Anything

Pro Only



## Can You Say What Your Strategy Is?

### Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

January 5, 2023

### Workshop by Sector – Pro Only

3<sup>rd</sup> Thursday @ 8 a.m. PT

January 19, 2023



## Culture of Change

### Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

February 2, 2023

### Workshop by Role – Pro Only

3<sup>rd</sup> Thursday @ 10 a.m. PT

February 16, 2023



## Running a Killer Quarterly Refresh

### Topic Deep Dive - General

1st Thursday @ 8 a.m. PT

March 2, 2023

### Workshop by Sector – Pro Only

3<sup>rd</sup> Thursday @ 10 a.m. PT

March 16, 2023

# You ARE the Collaborative.

**Deep Dive Topic Idea**

**From-the-Field Example**

**Lesson Learned**

**Burning Question or Challenge**

In Zoom Chat anytime! Or Email [collaborative@onstrategyhq.com](mailto:collaborative@onstrategyhq.com)



## **CSO** *Deep Dive*

**Can You (and your team)  
Say What Your Strategy Is?**

*What sets leaders apart:*

## **Focusing on the future**

**Clearly communicating future and people's stake in that future**

**Where the organization is on the path from here to there**



# From the Field Guests



**Ellie Westman Chin**

President & CEO

Destination Madison



**Kamryn Mock**

Lead Strategist

OnStrategy



Destination Madison is dedicated to creating economic impact through tourism.



destination  
**madison**

# Our Strategy Is...

## **Vision**

In the next five years, success looks like...

## **Scope & Focus**

We deliver value to....

## **Advantage**

Major shifts we are making are...

We will be successful because...

# Strategic Plan FY23-25 Summary

## Mission

Inspire a love for Madison.

## Vision

Madison is a place for all.



Strategic Pillar	By 2025, Success Looks Like...	Objectives and Approaches
<b>1</b> Grow Brand Awareness & Visitor Conversion	Madison is viewed as a “must see” destination nationwide.	<ul style="list-style-type: none"> <li>• Increase awareness of Madison as a travel destination.</li> <li>• Create and deliver curated content that tells our destination stories to <u>highly-targeted</u> audiences encouraging a visit to Madison.</li> <li>• Promote our authentic neighborhoods and define the unique stories of each area to increase visitation.</li> <li>• Develop a destination brand that authentically reflects Madison and is used <u>community-wide</u>.</li> </ul>
<b>2</b> Direct Room Night Growth	Off-season and shoulder room night growth is increased by 10% with a focus on the November-March time-period. Midweek utilization (Monday-Wednesday nights) is increased.	<ul style="list-style-type: none"> <li>• Off-season targeting for visitation and events hosted during non-peak times.</li> <li>• Optimize facilities to eliminate constraints and create capacity for more events.</li> <li>• Win a city-wide event (10k+ person) by 2025.</li> </ul>
<b>3</b> Support Regional Development	Greater awareness of Destination Madison’s impact in the community and residents/businesses want to get involved.	<ul style="list-style-type: none"> <li>• Grow partnerships to represent a diverse cross-section of the Madison community.</li> <li>• Strengthen engagement with community stakeholders to grow and foster connections.</li> <li>• Create and implement a Workforce Development plan to support our partners.</li> </ul>
<b>4</b> Support Regional Development	Safe, sacred, and busy neighborhoods are designated through branding and wayfinding.	<ul style="list-style-type: none"> <li>• Support the Destination District vision (Lake Monona waterfront, John Nolen Drive, Alliant Energy Center, and Southside Madison). Be the connector between key locations to advocate for easy mobility/movement in and around the distinct areas.</li> <li>• Identify development opportunities for venues and attractions necessary for visitors and residents. Gather understanding of what visitors and residents want to see and experience in the destination.</li> <li>• Make it easy to travel to and explore Madison by supporting additional direct air service and exploring other transit opportunities to get visitors to Madison and Dane County. Continue to have an advocacy role in transportation and strengthen the relationship between Destination Madison and Dane County Regional Airport.</li> </ul>
<b>5</b> Fiscal Stewardship	Achieve an operating budget of \$10 million, represented by a net growth of \$1 million per year. A predictable room tax revenue stream would be tremendously beneficial in future planning.	<ul style="list-style-type: none"> <li>• Increase funding from room tax collections and non-traditional sources to grow the budget by \$1M annually.</li> <li>• Explore non-traditional revenue streams such as Foundation support, grants, advertising opportunities for partners and corporate giving.</li> </ul>
<b>6</b> Diverse, Sustainable Organization	Destination Madison is viewed as a desired “employment destination” by a diverse and changing Madison community.	<ul style="list-style-type: none"> <li>• Create an employment destination by measuring employee engagement and satisfaction—assess, triage, be agile in changes.</li> <li>• Build an organizational culture focused on the employee experience where employees want to work, feel that their needs are met, and feel like valued team members. Benefits and equity align with the mission.</li> <li>• Provide staff and Board with the skills to implement DEAI in what they do in a seamless, meaningful, and authentic way.</li> </ul>

# 1 Grow Brand Awareness & Visitor Conversion



Increase the awareness and love for Madison through strong positioning of the destination in key growth markets.

## Organization Indicators

Indicator	'22 Actual	'23	'24	'25
Overnight Visitors to Madison		65%	66%	67%
Website Visits		2.3M	2.4M	2.5M
Social Impressions		30M	35M	40M
Direct Visitor Spend		\$1.6B	\$1.8B	\$2B

# Lessons Learned & Tips

What worked well?

What would you do differently?

What's your number one tip for other CSOs?



**Mid-sized manufacturing organization  
with a global presence.**

- High growth industry
- Highly regulated
- \$500M + in revenue
- Double digit growth over past 5 years
- Moving into maturity phase



## **CSO** *Master Class*

**Can You (and your team)  
Say What Your Strategy Is?**



A Model

# Can You Say What Your Strategy Is?



**Having a strategy is only as good as your team's understanding of it!**

## **Content – What to communicate?**

Vision, Scope, Advantage



## **Communication Tools – How to communicate?**

Comprehensive Plan, One-Page Plan, Videos, etc.



## **Audiences – To whom?**

Who are you communicating to via what channel w/ what tool



## **Reinforcement**

Calendar for communicating where you are on your journey

# Strategy Storyboard Canvas

Have each team member complete the exercise to review and communicate your Vision, Scope, and Advantage throughout your organization.

## 1 Vision *Where is your organization going in the future?*

Where do you see the business in the next 3-5 years?

What will have to be achieved?

## 2 Scope & Focus: *What is the domain of the business? How does it fit within the 3 dimensions?*

Customer Offering

Geographic Location

Delivery Mode/Method

## 3 Advantage *What do you do better than your competitors?*

1.

2.

3.

## 4 Can You Say What Your Strategy Is?

*Now take the elements from the 3 areas to the left to craft a strategy storyboard by completing the following sentences.*

In the next five years, success looks like...

We will know when we are reaching our vision because...

The scope of our organization is delivering unparalleled value to....

Focused in...

And reaching our customers by...

We will win because...

# Comms. Tools & Format

Deliverable	Description/Purpose
<b>Planning Deliverables</b>	
<b>Mural Board</b>	Virtual Whiteboard used throughout the planning process for team collaboration and strategy co-development.
<b>One Page Plan (PDF)</b>	Plan Summary & Communication Document; use for plan communication and sharing w/stakeholders.
<b>Strategic Plan Detail (Word Doc)</b>	Plan Detail; this document includes all detail of the planning process, strategy, district alignment and implementation process.
<b>Plan Overview (PPT) OR Video</b>	Plan Summary in PPT; slides to incorporate into other presentations or provide a quick overview of the strategy.
<b>Performance Deliverables</b>	
<b>Performance Scorecard</b>	Key Results, updated/managed via reporting tool.
<b>Strategic Management Playbook</b>	Implementation Resource to guide/support the management process.

# Planning Comms. Tools & Format

**Housing And Neighborhood Development Strategic Plan for FY23-24**

**Our Mission** *To create viable living environments for low to moderate income individuals and families.*

What We Are Doing (Goals)	Today (2022)	Tomorrow (2024+)	How We Will Do It (FY23 Initiatives)
<b>Goal #1</b> Increase Affordable Housing Stock	10,868 affordable units	Secure funding for 1,000 new affordable units/year	<ul style="list-style-type: none"> <li>Allocate funding towards development opportunities</li> <li>Explore creative incentives to attract affordable development</li> <li>Reimburse tenant housing to permanent, affordable units</li> <li>Lobby legislative changes to the tax exemption being lost to HOME funding</li> <li>Explore options for housing stock &amp; affordable housing stock</li> <li>Strengthen support non-traditional models for affordable housing programs</li> <li>Service HOME Loan Program portfolio to create more units/preserve affordability</li> </ul>
<b>Goal #2</b> Increase Residents' Housing Stability	Establish baseline medium CR % exiting into permanent housing	Increased number of households securing permanent housing	<ul style="list-style-type: none"> <li>Scale rental &amp; deposit assistance levels to align with available funding</li> <li>Establish a uniform standard and fee schedule for Housing Affordability</li> <li>Improve success rate of Reno Works graduates thru case management</li> <li>Evaluate and improve the effectiveness of the Rapid Rehousing Program and Veterans Transitional Housing Program</li> </ul>
<b>Goal #3</b> Invest in Low-To Moderate-Income Neighborhoods	Establish baseline for residents benefitting from improved neighborhoods	Increased number of residents benefitting from improved neighborhoods	<ul style="list-style-type: none"> <li>Rehabilitate a park in a low- to moderate-income neighborhood</li> <li>Improve public facilities in low- to moderate-income neighborhoods</li> </ul>
<b>Goal #4</b> Keep & Improve Affordable Housing Units	Zero affordable units lost in FY22	Zero loss of existing affordable housing units	<ul style="list-style-type: none"> <li>Expand existing homeowner rehabilitation programs, including emergency repair</li> <li>Explore policies to promote rental unit affordability, at the direction of Council</li> <li>Replace lost transient units with permanent housing stock</li> </ul>

## One-Page Strategic Plan

A one-page view of your strategic plan and objectives.



## Strategy Story PPT

An overview of your strategic plan filtered by department and team members.

Indicator	22 Actual	23	24	25
Organizations Indicator	100	100	100	100
Organizations Indicator	100	100	100	100
Organizations Indicator	100	100	100	100
Organizations Indicator	100	100	100	100

## Full Strategic Plan

A full export of your entire strategic plan.

## USING A BOLD VISION TO SOLVE HOMELESSNESS

*Strategy Stories From The Real World*

**Dana Searcy**  
Special Projects Manager and Strategy Leader  
Washoe County, Nevada

## Video Story

A full export of your strategic plan filtered to show individual team member goals.

# One-Page Plans are magic.



**County of Santa Clara Mission**  
Plan for the needs of a dynamic community, provide quality services, and promote a healthy, safe and prosperous community for all.



**TECHNOLOGY SERVICES AND SOLUTIONS**  
**FY21-24 Strategic Plan**

**TSS Mission** Partner with County departments to deliver services to our community through operational excellence and innovative technology solutions in support of the County's mission.

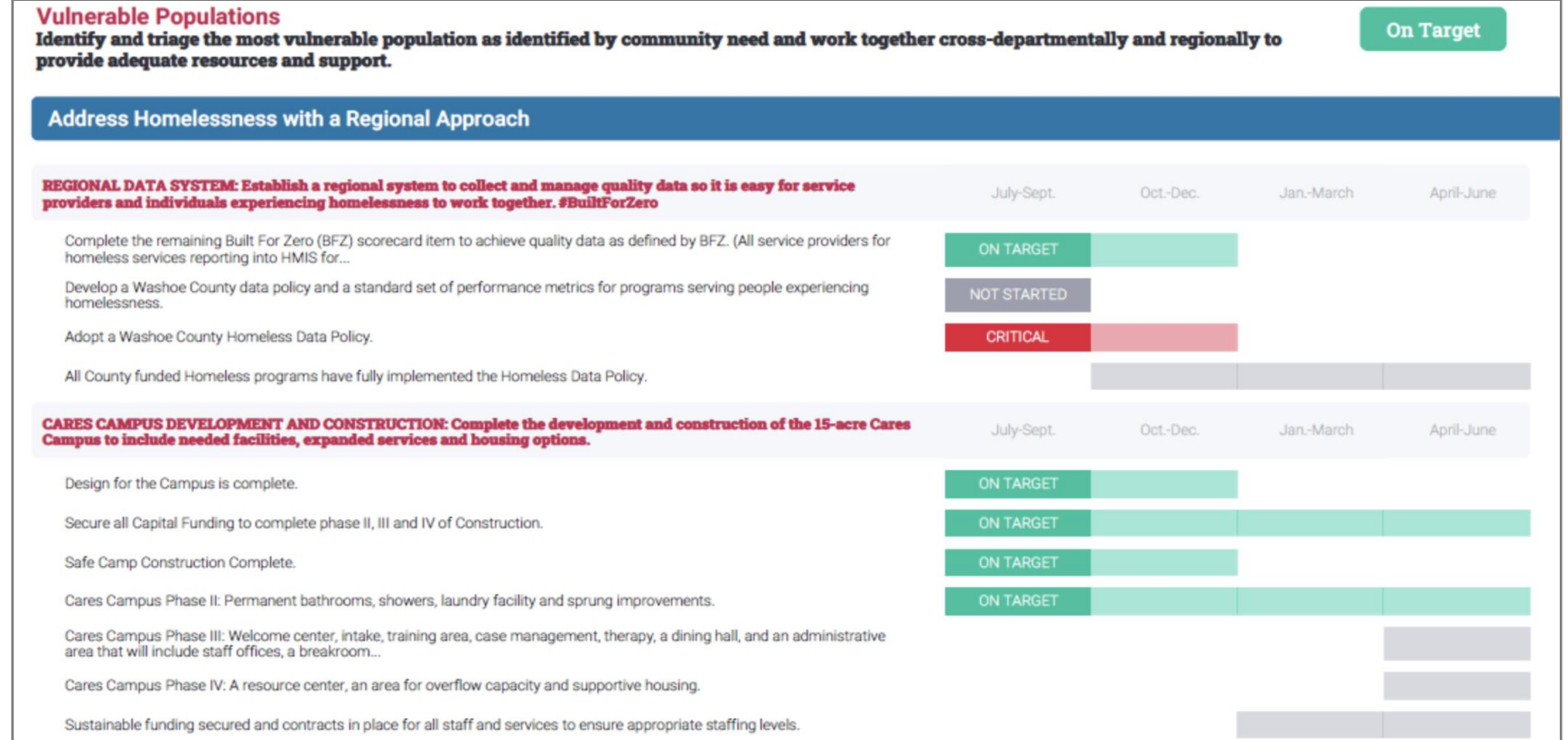
**TSS Core Values** Respect | Integrity | Accountability | Transparency | Compassion | Excellence

**County Vision** TSS' vision is the County's vision:  
*Engaged employees delivering exceptional customer experiences.*

### TSS Strategic Direction - Goals, Areas of Focus & Outcomes

 <p><b>Empower</b></p>	<p><b>Build a Diverse &amp; Highly Motivated Workforce</b></p> <ul style="list-style-type: none"> <li>Accelerate and simplify candidate selection, onboarding process and staffing model.</li> <li>Distribute decision making down the organization to increase our agility.</li> <li>Launch mentoring program that focuses on diversity, equity and inclusion and formalize succession plans.</li> </ul>	<p><b>Areas of Focus</b></p> <ul style="list-style-type: none"> <li>Align staff with areas of interest and related career paths.</li> <li>Create a system to capture knowledge when resources transition.</li> </ul>	<p><b>Outcome</b></p> <p><i>From the bottom to the top, our culture, processes and platforms ensure that good ideas are implemented by people who love what they do and feel they have a purpose and are valued.</i></p>
 <p><b>Build</b></p>	<p><b>Drive Operational Excellence &amp; IT Effectiveness</b></p> <ul style="list-style-type: none"> <li>Improve core operational processes.</li> <li>Simplify processes for securing small-scale, low complexity services open license management for tools that don't require a lot of coding (low-code tools).</li> <li>Centralize IT license management.</li> <li>Expand business continuity and disaster recovery capabilities.</li> <li>Establish Process Engineering Center of Excellence.</li> <li>Replace manual, administrative controls with technical controls for speed and consistency.</li> </ul>	<p><b>Areas of Focus</b></p> <ul style="list-style-type: none"> <li>Create a single, transparent intake process and governance for service/project demand.</li> <li>Proactively monitor events and create system to manage major incident response.</li> <li>Balance the best of federated and centralized IT structure for optimal customer experience and cost savings.</li> <li>Create and manage a centralized and comprehensive technology asset inventory.</li> <li>Identify and classify technical debt to manage replacement.</li> </ul>	<p><b>Outcome</b></p> <p><i>Our foundation — structures, systems, and processes — is stable and resilient, which enables our core capabilities to endure and get stronger. Achieving this outcome results in us being operationally excellent and delivering an our core services efficiently and effectively.</i></p>
 <p><b>Grow</b></p>	<p><b>Cultivate Organizational Maturity &amp; Collaborate with Our Partners</b></p> <ul style="list-style-type: none"> <li>Consistently incorporate Total Cost of Ownership into project recommendations.</li> <li>Align key technical domain strategies with business strategies.</li> <li>Establish an understandable and transparent charge-back model.</li> <li>Deploy an IT operations service catalog.</li> <li>Become a Business Analysis Center of Excellence.</li> <li>Advance the County's cloud transition.</li> <li>Develop a leaner technology acquisition process.</li> </ul>	<p><b>Areas of Focus</b></p> <ul style="list-style-type: none"> <li>Operationalize the IT Governance Board.</li> <li>Update and implement IT governance and IT standards</li> <li>Define TSS' concept of operations for internal alignment and customer satisfaction.</li> <li>Expand business relationship management processes and best practices.</li> <li>Complete the technology blueprint to ensure County infrastructure supports businesses' needs.</li> </ul>	<p><b>Outcome</b></p> <p><i>We are an agile, proactive and mature IT organization that leverages purposeful governance and best-practice frameworks. In doing so, we'll consistently deliver measurable value to our vertical business partners and in turn meet the needs of county citizens.</i></p>
 <p><b>Transform</b></p>	<p><b>Embed Innovation &amp; Transformation into Our Work</b></p> <ul style="list-style-type: none"> <li>Develop a comprehensive digital strategy.</li> <li>Integrate design-thinking into our work.</li> <li>Seek exponential opportunities for powerful value creation.</li> </ul>	<p><b>Areas of Focus</b></p> <ul style="list-style-type: none"> <li>Complete 25 proof-of-concepts per quarter.</li> <li>Partner with early adopter to test emerging technologies.</li> </ul>	<p><b>Outcome</b></p> <p><i>By embedding innovative thinking and experimentation into our work, our team is empowering Santa Clara to become the most technologically progressive county in the region.</i></p>

# Performance (Scorecards reinforce.)



# Audience & Deliverable Matrix

## Audience & Deliverable Matrix

	Managers & Above	Team Leads & Above	All Staff	Board of Directors	Customers	Key Partners	Key Stakeholders	Community At Large	Media	Misc.	Deliverable
<b>Rollout of 202X</b>	Monthly Exec Meeting	Thru Managers	Thru Leads	Jan Board Meeting	N/A	Special CEO Comm	Special CEO Comm	N/A	N/A		Beginning of year using One-Page Plan
<b>Strategic Direction</b>	CEO Email	Jan All Hands Meeting	Jan All Hands Meeting	Jan Board Meeting	N/A	Special CEO Comm	Special CEO Comm	N/A	N/A		Insert in monthly CEO comms, link to Comprehensive Plan
<b>Quarterly Priorities</b>	Monthly Exec Meeting	Thru Managers	Thru Managers. Pin in Slack	March, June, Sept Meetings	Newsletter	Newsletter	Newsletter				At end of quarter for next quarter. Simple Quarterly Summary.
<b>Strategic Performance</b>	Monthly Review Meeting	Thru Managers + CEO Email	Thru Leads + CEO Email	March, June, Sept Meetings	N/A	N/A	N/A	N/A	N/A		Quarterly Scorecard
<b>End-of-Year Highlights</b>	Monthly Review Meeting	Jan All Hands Meeting	Jan All Hands Meeting	Jan Board Meeting	End-Of-year 1 pager	End-Of-year 1 pager	End-Of-year 1 pager	Social push	Social push		End-of-Year 1 Pager of Accomplishments + Video Reel

### Communication Channels

- **Inboxes:** Direct Email - from CEO, Newsletter, Slack/Teams Messages
- **Meetings:** Weekly Stand Ups, Monthly Strategics, Quarterly Refreshes
- **Publications:** Intranet, Website, Traditional Media, Social Media

# Must-Remember Tips

## Dos

It's not about the “how,” it's about the “where” and “why.”

Make it believable.

Make it memorable – everyone, both internally and externally can say it.

Defend your ability to execute strategy with “proof points.”

## Don'ts

Make it about yourself.

Or, underthink it.

Over engineer it.

Believe that “launch and leave”, or “won and done” will make an impact.



# What's the Difference?

## CSO Collab

1<sup>st</sup> Thursdays @ 8am PT

Deep Dive Topic relevant to all leaders.

Summary of recording, resources and practical application.

800+ members and counting!

## CSO Pro

### Collab plus...

2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> Thursdays

A problem-solving resource for strategy leaders when needed

A private forum to network and collaborate with peers

150+ members and counting!

# Chief Strategy Officer Pro – Join us!

## YOUR Community of Practice:

- A gut-check on a new idea...
- An outside perspective on a problem you're too close to...
- Advice on a question you're expected to already have an answer for!

**When:** 1<sup>st</sup> & 2<sup>nd</sup> @ 8am PT  
3<sup>rd</sup> & 4<sup>th</sup> @ 8am PT (Jan)  
3<sup>rd</sup> & 4<sup>th</sup> @ 10am PT (Feb+)

**Who:** CEOs, VP/Directors of Strategy

**Cost:** 23% Off because it's 2023 😊

~~\$1,920~~ \$1,480/annual  
~~\$200~~ \$154/month

*For next 100 members!*

*Email [collaborative@onstrategyhq.com](mailto:collaborative@onstrategyhq.com)*

# CSO Collaborative

Final thoughts



## Expect today's content in your inbox

We'll email by tomorrow with links to resources we talked about.



## Suggestion for topics? Feedback?

Drop us a line anytime – let us know what you think and what you'd like to tackle as a group.

[collaborative@onstrategyhq.com](mailto:collaborative@onstrategyhq.com)

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