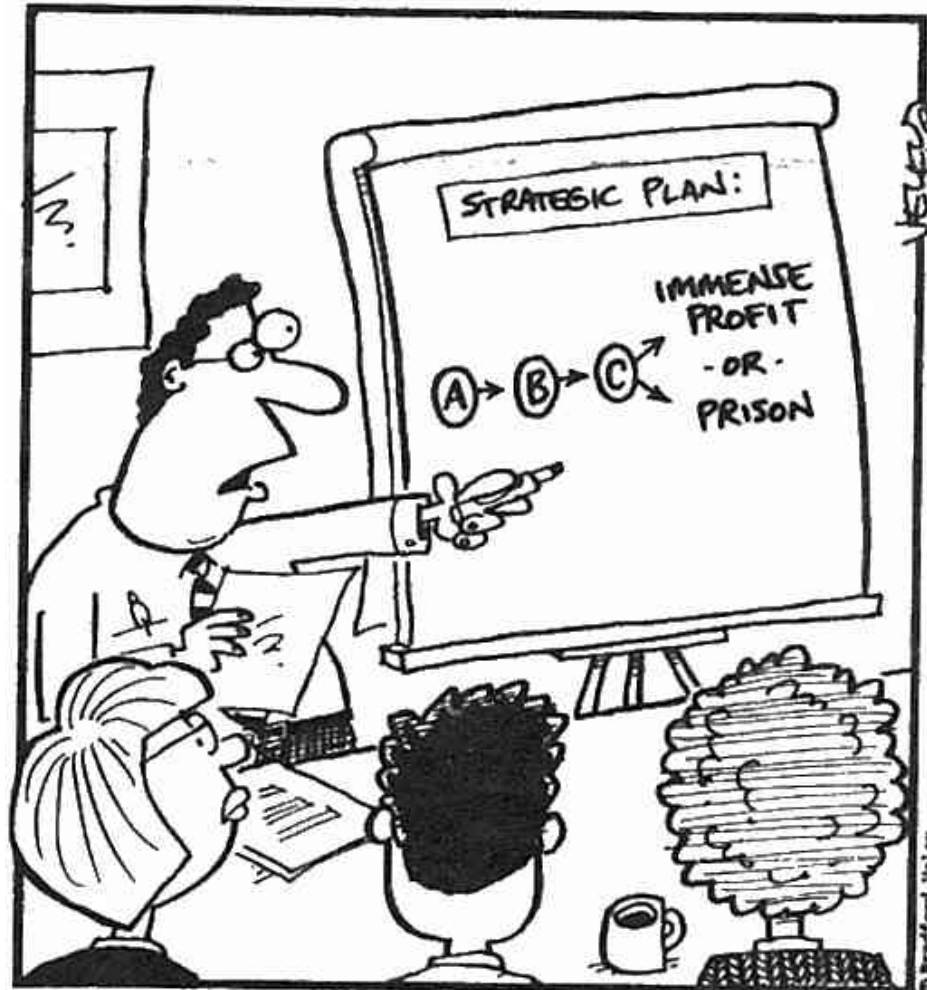


We will be getting started in just a few minutes.....While you are waiting, here is another perspective on strategy today..... or something to watch out for!



**"Stay with me now, people, because in step C, things get a bit delicate."**

mystrategicplan

Your success takes planning

Strategy Huddle™  
with MyStrategicPlan

# PURPOSE & GROUND RULES

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## **Purpose**

Answer real-world questions, handle high-level strategy issues, and share best practices on strategy, execution, planning

## **Duration**

45-60 minutes

## **Your Role**

Ask questions: Questions can be submitted via the Chat Box on right at any time. \*\*

Offer suggestions: Share your experience via the Chat Box during the topic at hand

## **Details**

Session will be recorded. Slides to be emailed out to participants.

# AGENDA

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- I. Strategy Stat of the Month
- II. Adapting your plan - ops vs. strategy
- III. Making better decisions
- IV. Evaluating the effectiveness of your mission and vision
- V. Live Questions

# 10 MOST COMMON LEADERSHIP SHORTCOMINGS

## The Worst Leaders:

1. Lack energy and enthusiasm
2. Accept their own mediocre performance
3. Lack clear vision and direction
4. Have poor judgment
5. Don't collaborate
6. Don't follow the standards they set for others
7. Resist new ideas
8. Don't learn from mistakes
9. Lack interpersonal skills
10. Fail to develop others

*HBR, June 2009, 360-degree feedback data on over 11,000 leaders and evaluating the 10% considered the least effective, Jack Zenger and Joseph Folkman*

*How often should I revise my strategic plan? Are they revisions "tweaks" or wholesale rewrites?*

## **QUESTION: UPDATING/REVISING YOUR PLAN**

# STRATEGY REVIEW PROCESS

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- ❖ Operational reviews should be separate from strategy reviews
  - Monthly operational reviews focus on short-term operations, not strategy
  - BSC study revealed that 85% of management teams spend less than 1 hour a month discussing strategy

*\* Adapted from Balanced Scorecard Collaborative (BSC) Report, December 2006*

# STRATEGY REVIEW PROCESS

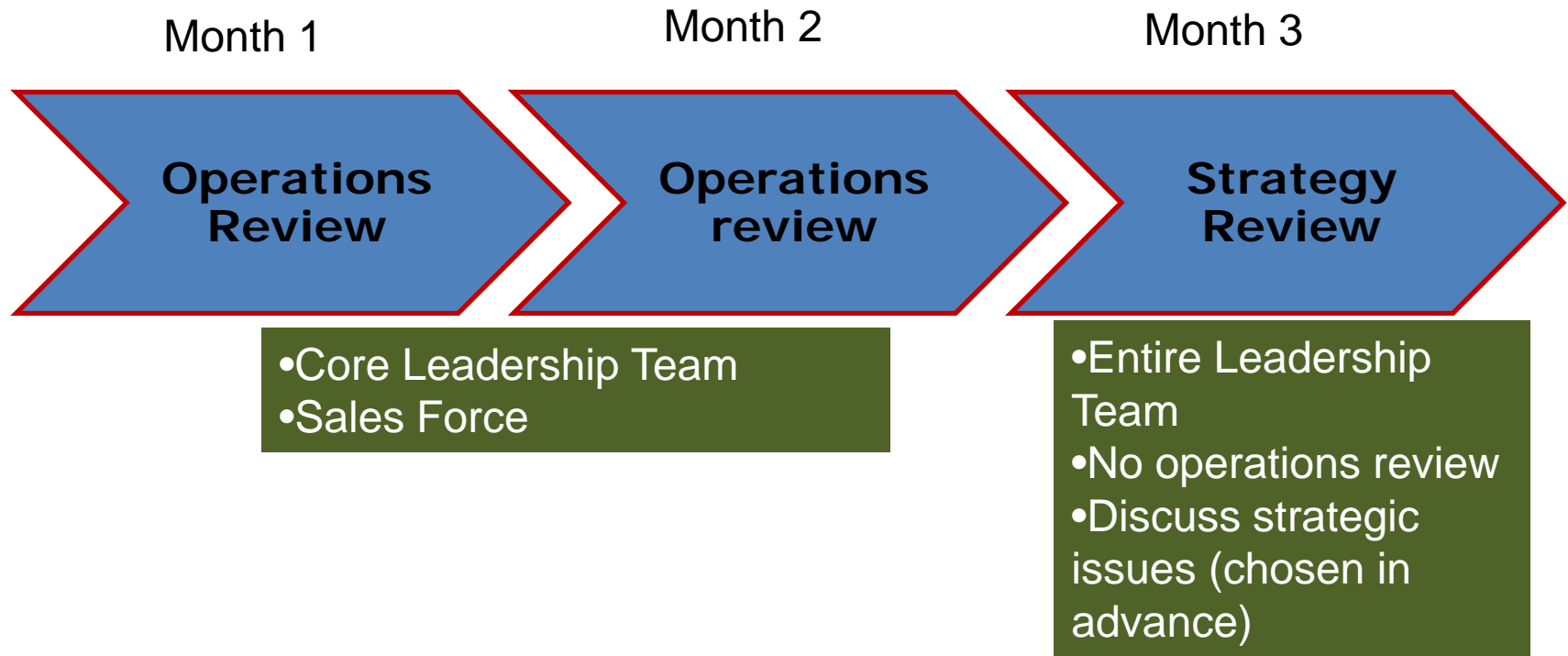
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- ❖ Review strategy on a quarterly basis
  - Strategy should be long-term, so there will be little change from month to month
  - Strategy does need to stay top of mind, so review of a specific strategic theme on a monthly basis by Core Leadership Team can help keep that focus

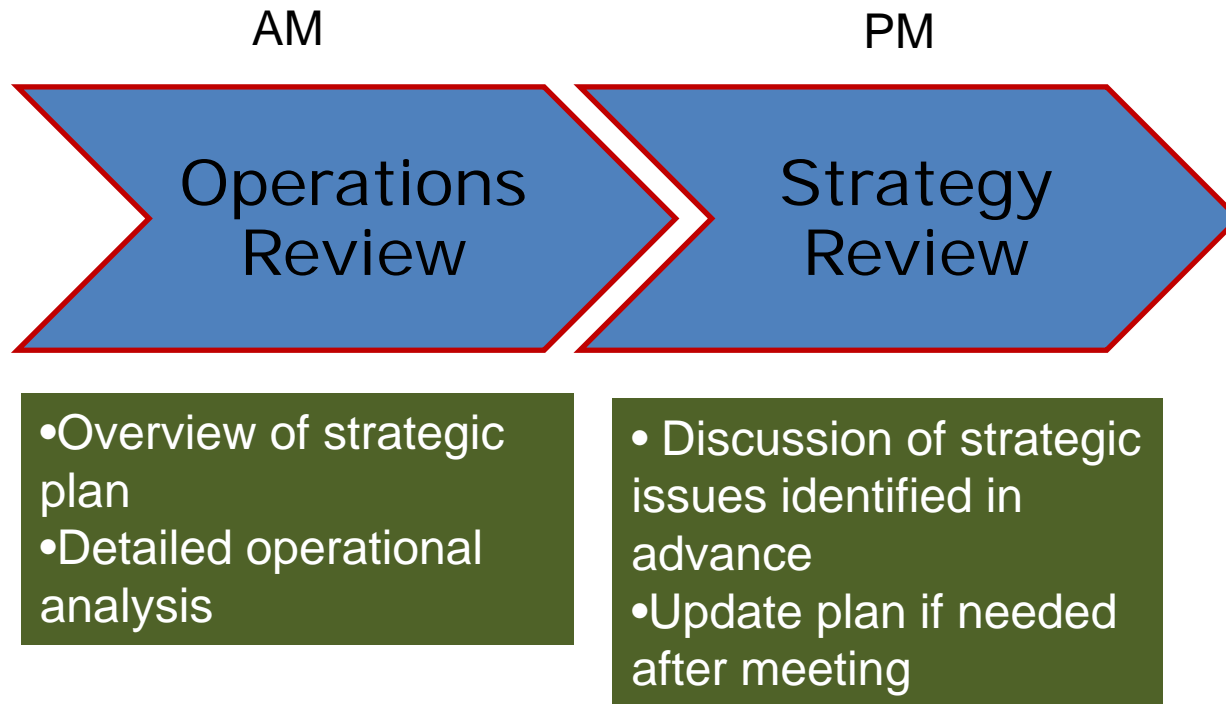
*\* Adapted from Balanced Scorecard Collaborative (BSC) Report, December 2006*



# OPTION #1



# OPTION #2



# SUMMARY ACTIONS

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- ❖ Operational reviews should be separate from strategy reviews
- ❖ Review strategy on a quarterly basis
- ❖ Promote accountability, transparency and teamwork.
- ❖ Create meeting agendas that are issue-oriented

*How are the great companies adapting to this continually uncertain and changing environment?  
What should I be learning from them?*

## **QUESTION: MAKING BETTER DECISIONS**

# MAKING BETTER DECISIONS

- ❖ The downturn demands that companies **become more efficient** not only in their operations but also in incorporating more **customer-centric information** into decisions.
- ❖ Although the focus of decisions at one-half of the companies surveyed has shifted to the short-term and tactical—to survival, in other words—**executives also agree that a company cannot make tactical decisions without a vision** of where it wants to be in the long term.

*(Results and analysis from the Economist Intelligence Unit, May 2009 Survey of 229 senior executives)*

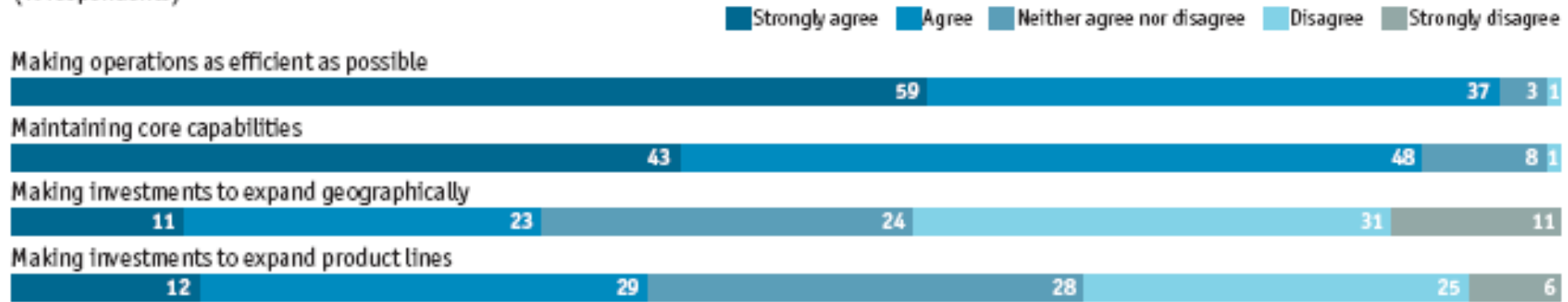
# MAKING BETTER DECISIONS

- ❖ Survey respondents note the need to **diversify the sources of information used** to make decisions, both inside the company and outside it.
- ❖ Two-thirds of respondents say that the **financial and operational information** held by the finance function—is the **most important** input for good decisions.
- ❖ Also important information sources are the **strategic planning function** and those with direct pipelines to the customer, notably the sales, marketing and customer-service departments.

*(Results and analysis from the Economist Intelligence Unit, May 2009 Survey of 229 senior executives)*

# FOCUSING ON WHAT YOU CAN CONTROL

**My organisation is currently focusing on:**  
(% respondents)



*(Results and analysis from the Economist Intelligence Unit, May 2009 Survey of 229 senior executives)*

# SUMMARY ACTIONS

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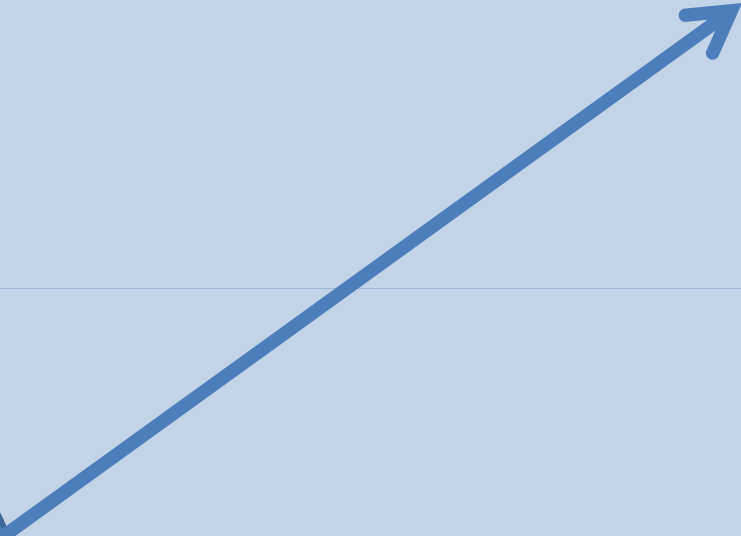
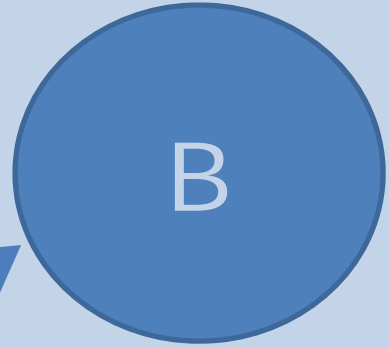
The principles of good decision-making and focusing on what you can control include:

- ❖ Being proactive
- ❖ Ensuring that decisions are made at the appropriate level in the organization
- ❖ Basing decisions on the best information available



*I know this seems basic, but can you tell me again what the difference is between a mission and a vision?*

## **QUESTION: EVALUATING THE EFFECTIVENESS OF YOUR MISSION & VISION**



# MISSION EVALUATION

The mission statement tells “who” your customers are and “what” customer needs your company wishes to satisfy.	<b>Yes</b>	<b>No</b>
The mission statement is based on your core competencies. <i>(A core competency is a competitively superior unique strength.)</i>	<b>Yes</b>	<b>No</b>
The mission statement is in the present tense.	<b>Yes</b>	<b>No</b>
The mission statement is realistic.	<b>Yes</b>	<b>No</b>
The mission statement is specific, short, sharply focused and memorable.	<b>Yes</b>	<b>No</b>
The mission statement is clear and easily understood.	<b>Yes</b>	<b>No</b>
The mission statement says why your company exists.	<b>Yes</b>	<b>No</b>

# NIKE

Our mission is to bring inspiration and innovation to every athlete\* in the world.

\*If you have a body, you are an athlete.

# GOOGLE

To organize the world's information  
and make it universally accessible  
and useful.

## **WAL-MART**

To give ordinary folk the chance to buy the same thing as rich people.

## **Microsoft**

To enable people and businesses throughout the world to realize their full potential.

# VISION EVALUATION

YES	NO	Do you find this BHAG exciting?
YES	NO	Is the BHAG clear, compelling, and easy to grasp?
YES	NO	Does this BHAG somehow connect to the core purpose?
YES	NO	Will this BHAG be exciting to a broad base of people in the organization, not just those with executive responsibility?
YES	NO	Is it undeniably a Big Hairy Audacious Goal, not a verbose, hard to understand, convoluted, impossible to remember mission or vision "statement"? In other words, does it pass the "Mount Everest Standard"?
YES	NO	Do you believe the organization has <i>less</i> than 100% chance of achieving the BHAG (50% to 70% chance is ideal) yet at the same time believe the organization <i>can</i> achieve the BHAG if fully committed?
YES	NO	Will achieving the BHAG require a quantum step in the capabilities and characteristics of the organization?
YES	NO	In 25 years, would you be able to tell if you have achieved the BHAG?

*Source: Jim Collins*

# COVER STORY VISION

COLLECTOR'S EDITIONS

# TIME

Everyday Citizens  
change the Face  
of Child Welfare

# THE CHILDREN ARE WELL

National CASA:  
Organization of the Year



# COVER STORY VISION



Letter from  
the Editor

IN GENERAL:

LESS INCARCERATED

LESS HOMELESS

LESS TEEN PREGNANCY

LESS ENTER INTO CARE

LESS REPEATS

MORE w/ HEALTH INSURANCE

MORE ENTER COLLEGE

# COVER STORY VISION

## PARTNERS AND PRODUCTS

Target

Sears

Procter & Gamble

Johnson & Johnson

Nike ✓

...

...

## ARTICLE 1:

"AVERAGE 'JOES AND JANES' BECOME CHAMPIONS FOR CHILDREN"

## ARTICLE 2:

"FOSTER YOUTH GRADUATE H.S. at HIGHER RATES THAN GENERAL POP."

## ARTICLE 3:

"AGING OUT: NO CHILD AGES OUT ALONE"

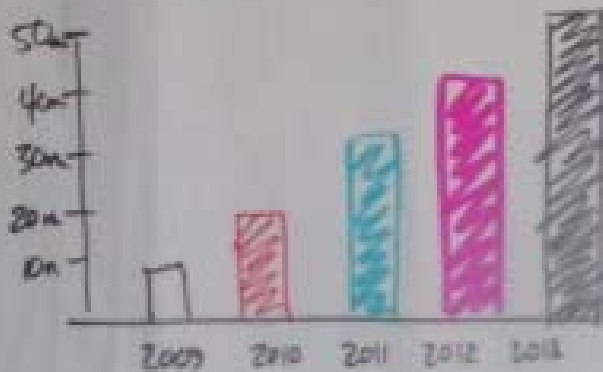
## ARTICLE 4:

"BREAKING THE CHAINS OF DISPROPORTIONALITY & DISPARATE OUTCOMES"

# COVER STORY VISION

## By the Numbers

### FUNDING



### IMPACT



How National  
CASA changed  
the face of  
child advocacy

1999

2009

2014



BBB  
Charity Nav  
CJJD

# COVER STORY VISION



# VISION – OUR DIRECTION

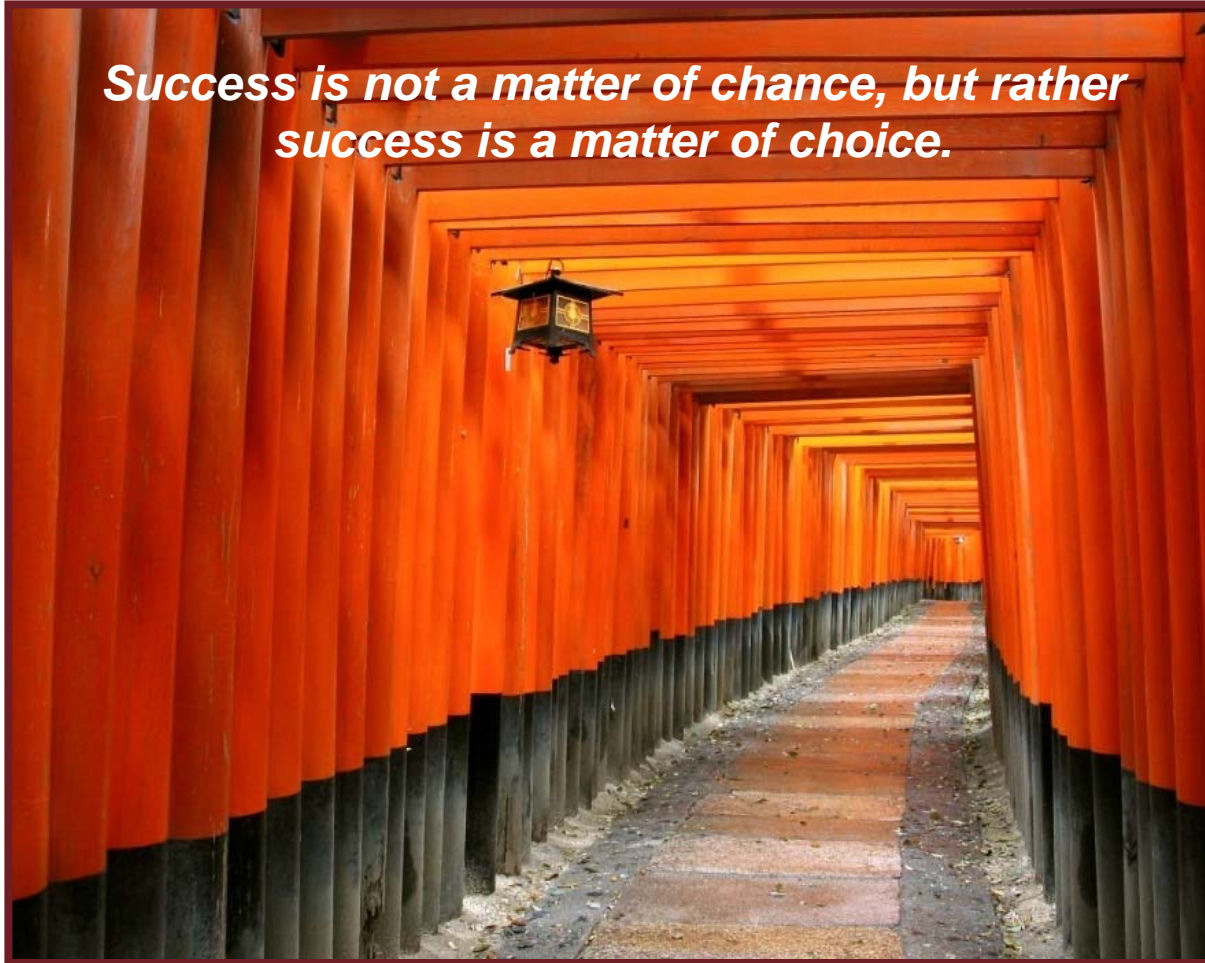
We will help to assure the wellbeing of All children who have been abused or neglected and are at highest risk for disparate or poor foster care outcomes.

We will ask... **How are the children?**  
*Kasserian Ingera? Como están los niños?*

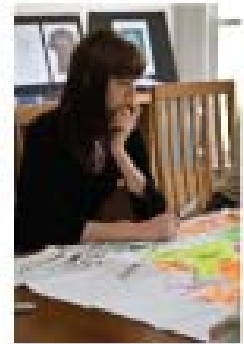
And the answer will be... **The children are well,** *Sapati Ingera, Están Bien*

# IN-THE-MOMENT QUESTIONS

*Success is not a matter of chance, but rather success is a matter of choice.*



# ABOUT US



**mystrategicplan**  
Your virtual VP of strategy

**mychurchplan**  
Your success takes planning

**mynonprofitplan**  
Your success takes planning



**mystrategicplan**  
Your success takes planning

# NEXT HUDDLE

- ❖ 9am PT, January 20<sup>th</sup>
  - Potential topics:
    - What is strategy?
    - Writing goals that you can execute and cascade
    - Moving from your retreat/offsite to execution
- ❖ Send in questions for the next Strategy Huddle to [admin@mystrategicplan.com](mailto:admin@mystrategicplan.com) and reference the Strategy Huddle in the subject line
- ❖ Questions submitted during presentation that we did not get to will be followed up via email or phone call.
- ❖ Today's session is being recorded and will be posted.



# CONTACT INFORMATION

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