

However beautiful the strategy, you should occasionally look at the results.

Winston Churchill,  
British Prime Minister



MYSTRATEGICPLAN TRAINING

EXECUTION, EXECUTION,  
EXECUTION

## M3 BY THE NUMBERS

In the past three years we have...

- Managed 100+ strategic planning processes
- Deployed 800+ strategic management systems
- Built consensus and commitment with 3,000+ executives, managers, boards
- Empowered 1 million+ strategists & soon-to-be strategists

*We love what  
we do!*



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## MYSTRATEGICPLAN OVERVIEW



**Create Strategy Faster(er)**



**Empower the Team**



**Manage Execution**



## AGENDA

1. Establish an execution schedule with correct frequency, tools and reports to support the process
2. How to effectively review your progress and track your key performance indicators using MyStrategicPlan
3. How to run great monthly strategy review meetings
4. So You Have a Strategic Plan...Now What?



## MSP STRATEGIC PLANNING PROCESS

### Our Strategic Management Process

Getting started: ✓ Planning team ✓ Create schedule ✓ Gather documents

Determine Position	Develop Strategy	Build the Plan	Manage Performance
<b>Strategy Issues:</b> Identify strategic issues to address	<b>Mission:</b> Determine your organization's core purpose.	<b>Use SWOT:</b> Process the SWOT to set priorities.	<b>Rollout:</b> Communicate strategy to whole organization
<b>Industry &amp; Market Data:</b> Identify market opportunities and threats	<b>Values:</b> Identify your core beliefs.	<b>Organizational Goals:</b> Set short- to-mid-term SMART goals. (1+ yr.)	<b>Set Calendar:</b> Establish schedule for progress reviews
<b>Customer Insights:</b> Assess current satisfaction and future demand.	<b>Vision:</b> Create an image of what success looks like in 5 years.	<b>KPIs:</b> Select key performance indicators to track progress.	<b>Leverage Tools:</b> Train team to use MyStrategicPlan
<b>Employee Input:</b> Determine strengths and weaknesses.	<b>Competitive Advantages:</b> Solidify your unique position	<b>Department Goals:</b> Cascade org goals to departments. (12 months)	<b>Adapt Quarterly:</b> Hold progress reviews and modify
<b>SWOT:</b> Synthesize the data into summary SWOT items.	<b>Org. Wide Strategies:</b> Establish the approach for how you will succeed	<b>Team Member Goals:</b> Cascade dept. goals to individuals.	<b>Update Annually:</b> Review end of year, plan next year.
	<b>Long-Term Objectives:</b> Develop a 3 year balanced framework of 6 or less objectives.	<b>Budget:</b> Align a one-year budget with the plan.	
	<b>Forecast:</b> Develop a 3-year financial projection.		



## IMPLEMENTATION OVERVIEW

### How will we use the plan as a management tool?

*Definition:*

Implementation is the process that turns strategies and plans into actions in order to accomplish strategic objectives and goals.

*Outcome:*

Synching checking in with your plan into the "rhythm of your business"



## QUESTIONS TO ASK

- **Communication Schedule:** How and when will you rollout your plan to your staff? How frequently will you send out updates?
- **Process Leader:** Who is your strategy director?
- **Structure:** What are the dates for your strategy reviews (we recommend at least quarterly)?
- **System & Reports:** What are you expecting each staff member to come prepared with to those strategy review sessions?




## TIPS

1. Narrow the focus - select high priority goals.
2. Empower the team to act on lead measures.
3. Make progress visible - weekly.
4. Create a cadence of accountability.




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## CREATE A CADENCE OF ACCOUNTABILITY

		July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	Required Reports
<b>Planning</b>	Strategic Planning	Strategic Plan Approved							Review/Modify Strategic Plan for FY 14-15					<ul style="list-style-type: none"> <li>Comprehensive Strategic Plan</li> <li>Strategic Plan Brochure</li> </ul>
	Annual Planning	Complete Department Action Plans for FY 13-14 and FY 14-15												<ul style="list-style-type: none"> <li>Department Action Plans</li> <li>Team Member Action Plans</li> </ul>
	Budgeting						Begin Developing Budget for FY 14-15	Budget Calibration for FY 13-14			Budget for FY 14-15 Sent for Approval	Budget Approved for FY 14-15		<ul style="list-style-type: none"> <li>Current Year Budget</li> <li>Current Year YTD CapEx Expenditures</li> </ul>
<b>Engagement</b>	Community Engagement													<ul style="list-style-type: none"> <li>One-Page Plan</li> <li>Strategic Plan Brochure</li> </ul>
	Staff Comm.													<ul style="list-style-type: none"> <li>Comprehensive Strategic Plan</li> </ul>
<b>Execution</b>	Board Progress Reporting		Pre-planning Report to Board during retreat			Q1 Progress Report to Board			Q2 Progress Report to Board			Q3 Progress Report to Board		<ul style="list-style-type: none"> <li>Executive Summary with Progress</li> <li>Strategy Review PowerPoint</li> </ul>
	Staff Progress Report				QBR			QBR			QBR			<ul style="list-style-type: none"> <li>Department Action Plans</li> </ul>

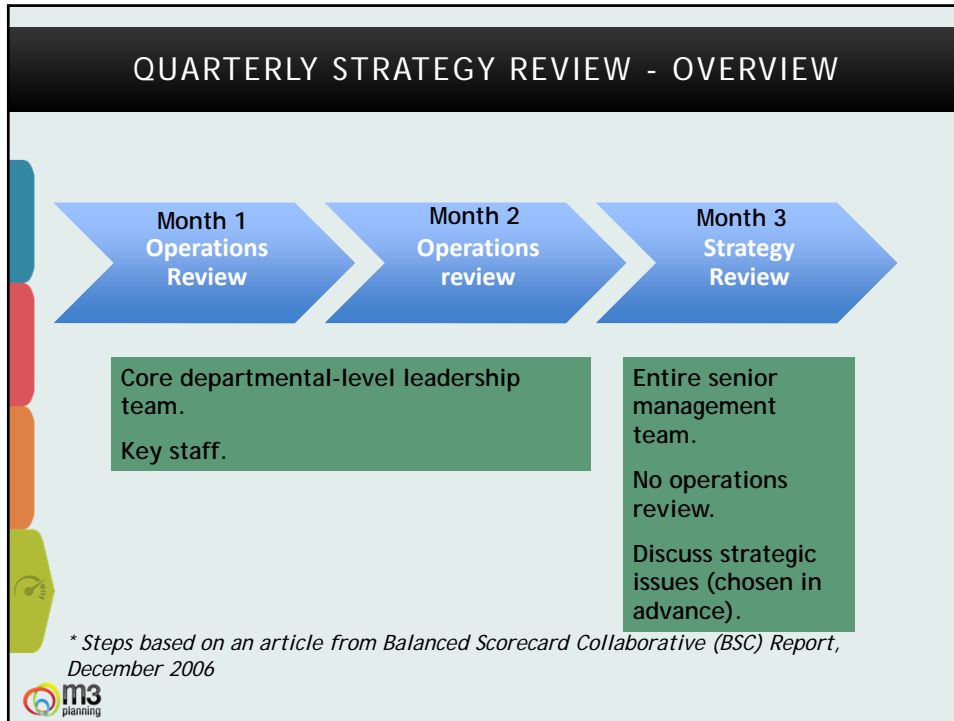


Board of Trustees

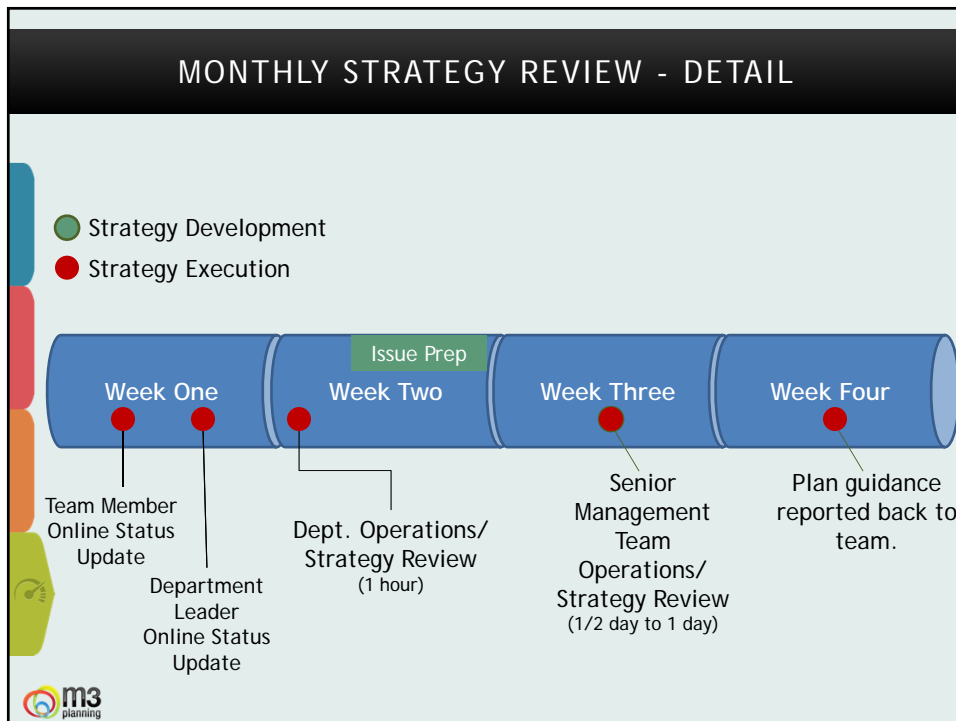
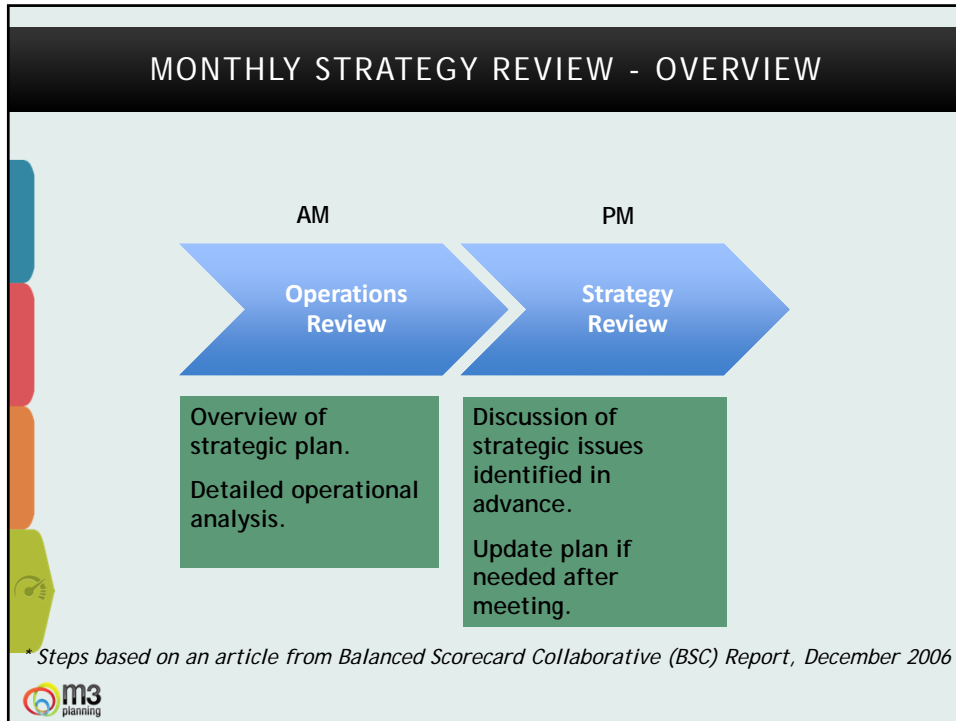
Pres./CEO

Department Directors

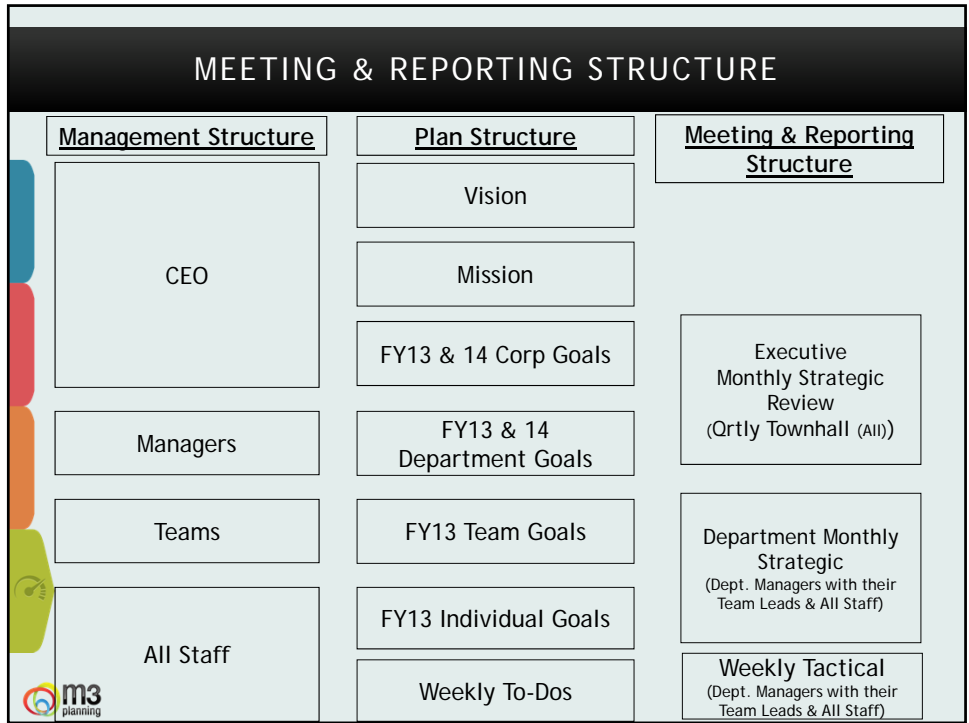
All Staff












## KNOWING WHAT YOU ARE TRACKING

**Qualitative Measures:** Managerial estimation of status, stoplight icon, % complete - milestone status, tracked as point in time.

**Quantitative Measures:** Marked as Key Performance Indicators, tracked monthly.


- Sum: \$ in revenue, # of new customers
- Average: Profit margin %, number of returns, days on hand
- Highest number: Running totals
- Lowest number: Error rates, defects
- Current: # of customers

- **Source:** Note the source for easy of updating
- **Frequency:** Identify metrics that are tracked monthly



## WHO IS RESPONSIBLE FOR WHAT

<u>Management Structure</u>	<u>Plan Structure</u>	<u>Accountability Structure</u>
CEO	Vision Mission FY13 & 14 Corp Goals	Lag Measures
Managers	FY13 & 14 Department Goals	Lead Measures
Teams	FY13 Team Goals	
All Staff	FY13 Individual Goals	Milestone Status



## Strategy Alert REPORTS TO USE Regy Review Meetings

**ABC Company 2012-2014 Strategic Plan - Your Goals and Action Items**

Dear John Smith,

Here is the status of outstanding goals and action items you have been assigned in your plan. Use this To Do list as a guide to help you accomplishing key strategic activities.

Need to update any of the items below? Simply go to the **Track Goals and Action Items** information reflects plan progress as of the date of this mail.

Item	Start	End	Status
Customer Acquisition - Software Management: Increase overall funnel conversion to 15% through lead and MQL and optimizing my campaigns.	1/1/2012	12/31/2014	Normal
Which to learn 80% increase over 2012 in the percentage of contact who become leads up to 7% on average of 5% (Share, Analyze, Source, etc.)	1/1/2012	12/31/2014	Normal
Update public website with new design	1/1/2012	12/31/2014	Normal
Customer Acquisition - Customer Experience: Reduce 100 new clients with a focus on software and support status	1/1/2012	12/31/2014	Normal
Successful build and launch of 20 website and organic SEO campaign: MEASURE SHOULD BE 30%	1/1/2012	12/31/2014	Normal
Customer Retention: Reduce churn to 20% to 15.0%	1/1/2012	12/31/2014	Normal

Date Revised: November 10, 2010

Priority	Team Goals & Team Member Goals	Who	Year End Target	% Complete YTD	Status	Start Date	End Date
1.1	Development of a new performance recognition program for unit, district, and council. (Impact Natl Obj 1, Goal 2; Council Ops Goal 1.1; Impact Natl Obj 6; Goal 2; Council Ops Goal 5.1) (% complete of new performance recog. program)						
1.2	Propose / recommend the charter classification protocol, by Sept 1, 2010. (Impact Natl Obj 1, Goal 2; Council Ops Goal 5.1) (% complete of the charter classification protocol)						
1.3	Populate the Council Impact Tracker tool with all Council visits in the last 3 years and encourage Area Directors to keep the information up to date. (Impact Natl Obj 1, Goal 1; Council Ops Goal 1.1) (% of effectiveness of tool based on the survey of AD)						

Comments on Status: Online/Realtime not implemented begins


Date Revised: November 10, 2010

Priority	Team Goals & Team Member Goals	Who	Year End Target	% Complete YTD	Status	Start Date	End Date
1.1	Development of a new performance recognition program for unit, district, and council. (Impact Natl Obj 1, Goal 2; Council Ops Goal 1.1; Impact Natl Obj 6; Goal 2; Council Ops Goal 5.1) (% complete of new performance recog. program)						
1.1.1	Define standards for a new performance recognition program for unit, district, and council.	Council Organization Solutions	100%	70%	●	1-9-2010	12-31-2010
1.1.1.1	Develop the program based on new standards.	Stan Wiley	100%	100%	●	1-1-2010	3-31-2010
1.1.1.2	Administer assistance and support on the development of this program.	Mita Epley	100%	40%	●	1-1-2010	12-31-2010
1.3	Populate the Council Impact Tracker tool with all Council visits in the last 3 years and encourage Area Directors to keep the information up to date. (Impact Natl Obj 1, Goal 1; Council Ops Goal 1.1) (% of effectiveness of tool based on the survey of AD)						
1.3.1	Populate the Council Impact Tracker tool with all Council visits in 2010 and encourage Area Directors to keep the information up to date.	Council Organization Solutions	100%	100%	●	1-1-2010	12-31-2010


Comments on Status: Book meeting to present at multiple meetings

**MyStrategicPlan Settings:**

- Set the department and team member strategy alert dates.
- Check out last login note



## MY STRATEGIC PLAN Cheat Sheet

MyStrategicPlan.com | 775.747.7407 Contact: admin@m3planning.com  
copyright: ©2013 M3 Planning All rights reserved. 

### 1. Getting started

- Go to: [mystategicplan.com](http://mystategicplan.com)  
Login feature is at the upper right hand corner of the home page.
- Login:  
Username: Your email address (case sensitive)  
Password: XXXXXXXX

### 2. Add/revise/update your goals & actions

- Go to Plan > Goals
- Add, revise, or delete what is assigned to you by clicking on the item.

**Tip:** Can't edit an item? That means you don't have permission to change it. Here is how permissions work:

- 1. Strategy Objective (Strategy leader only)
- 1.1. Organization Goal (Strategy leader only)
- 1.1.1. Department Goal (Department manager only)
- 1.1.1.1. Team Member Goal (Team member only)
- 1.1.1.1.1. Team Member Action Goal (Team member only)

**Tip:** Don't see your whole plan? Click on the "All" button on the top left of the screen.

### 3. Update your status & track your progress

- Go to Performance > Track Performance
- Update Your Progress when you see a pencil

① Items where you are tracking progress with general status click the status icon

- Select current status "What's my progress"
- Enter how complete you are year to date
- Add a small comment that explains the status and make sure to start it with the current date


② Items where you are tracking metrics, on a scorecard

- Select current status "What's my progress"
- Enter performance metric for the current month
- Add a small comment and make sure to start it with the current date

**Tip:** Remember this is your managerial estimation of how you are progressing against your goals. Don't write a novel or over-think the data input. It is simple on purpose.

### 4. Reports for your meetings

- Reports > Department Plan  
Download your Full Plan with Status to see item and progress.
- Reports > Individual Contributors  
Download your Action Plan report to view actions, status and comments.





*The monthly or quarterly  
review meeting is the  
heartbeat of the strategy  
management process.*

## REPORTS TO USE

Purpose	Reports	Who
Executive Strategy Review Meeting	<ul style="list-style-type: none"> <li>Executive Summary with Progress</li> <li>Dept. Action Sheet</li> <li>The Dash</li> </ul>	CEO Department Managers
Department/ Functional Strategy Review Meeting	<ul style="list-style-type: none"> <li>Dept. Executive Summary with Progress</li> <li>Individual Action Sheets</li> <li>The Dash</li> </ul>	Department Manager Individual Contributors
Team/Individual Reviews	<ul style="list-style-type: none"> <li>Individual Action Sheets</li> </ul>	Individual Contributors



## STRATEGY SESSION AGENDA

Item	Responsibility & What to Bring
<u>Overview – Clarify the Agenda</u>	CEO
<u>Corporate Scorecard Status</u> 1. Report on corporate KPIs – on and off target	CEO
<u>Dept. Scorecard Status:</u> 1. Note accomplishments. 2. Report on status of your goals and measures. 3. Determine steps to get off track items back on track.	Department Manager Bring overall "team action sheet" and "department full plan with status".
<u>Strategic Issues/Topics:</u> 1. Address any items that came up in the team updates. 2. Discuss (formally or informally) strategic issues in order of critical importance to the business. (Brief the issue, identify alternatives, suggest solutions, identify next action.)	Issue leader Bring issue briefing material
<u>Meeting Review</u>	CEO



## STRATEGY REVIEW SESSION QUESTIONS

- What were our three most important strategic accomplishments of the last 90 days - how have we changed our field of play in the past 90 days?
- What are the three most important ways we fell short of our strategic potential?
- In the last 90 days, what are the three most important things that we have learned about our strategy? (NOTE: We are looking for insight to decision to action observations.)



## TIPS AND TRICKS

- ✓ Good strategic thinking is hard - work at it!
- ✓ Strategy is "yours" not "theirs"
- ✓ Using the plan to guide decisions - that means everyone in this room
- ✓ Think "coordinated" action
- ✓ Drive for a clear understanding of your part
- ✓ Zoom out and then zoom in



## STRATEGIC PROCESS EVALUATION

### Test Your Strategy:

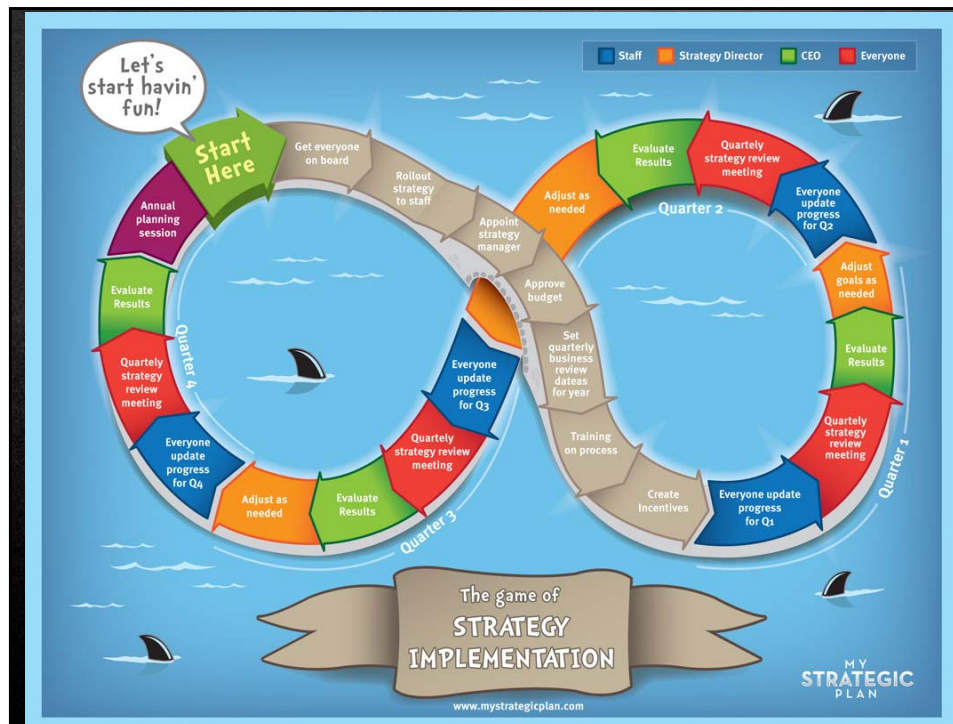
- Will your strategy beat the market?
- Does your strategy tap a true source of advantage?
- Is your strategy granular about where to compete?
- Does your strategy put you ahead of trends?
- Does your strategy rest on privileged insights?
- Does your strategy embrace uncertainty?
- Does your strategy balance commitment and flexibility?
- Is your strategy contaminated by bias?
- Is there conviction to act on your strategy?
- Have you translated your strategy into an action plan?



(McKinsey Article)







## 5 KEYS OF IMPLEMENTATION

1. Culture
2. People
3. Resources
4. Structure
5. Systems

## IMPLEMENTATION PITFALLS

- ❌ Annual Strategy
- ❌ Lack of Communication
- ❌ Lack of Empowerment
- ❌ Lack of Ownership
- ❌ A Meaningless Plan
- ❌ No Accountability
- ❌ No Progress Report
- ❌ Not Considering Implementation
- ❌ Out of the Ordinary
- ❌ An Overwhelming Plan



## YOUR CHECKLIST

- ❌ Get broad and diverse input from the beginning.
- ❌ Make the strategy personal - what is my role?
- ❌ Build the strategy to execute it - who is doing what when.
- ❌ Publish a year-long calendar.
- ❌ Set up your strategy alert triggers.
- ❌ Identify the types of measures you need to use, the source of the data and frequency.
- ❌ Hold regular, consistent strategy reviews - decide on monthly or quarterly.
- ❌ Keep your plan up to date.



**GET EXPERTISE WHEN YOU NEED IT**  
ONE-ON-ONE GUIDANCE FOR THOSE TROUBLE SPOTS IN YOUR PLANNING

[mystrategicplan.com/strategic-planning-consulting](http://mystrategicplan.com/strategic-planning-consulting)

	Quick Start Coach		Strategy Support
	Strategic Plan Review		Customer / Employee Surveys
	Plan Set-Up		Execution Workshop



**UPCOMING TRAININGS**

- **Strategic Planning 101**  
October 2 | 12 p.m. PT
- **Setting Strategic Objectives and Cascading Goals**  
October 9 | 9 a.m. PT
- **Execution, Execution, Execution**  
October 24 | 9 a.m. PT



To view one of our latest white papers titled,  
"So You Have a Strategic Plan...Now What?"

Go to:

<http://mystrategicplan.com/get-your-game-on/>



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