“What’s the use of running if you are not on the right road?”
– German proverb
Today’s Agenda

The Art of Strategy Implementation | Tina Nazier

• Designing the right strategy for your organization
• Building engagement at all levels (employees need to carry the change—leaders can’t)
• Incorporating a deliberate change management approach to increase your success
• Developing an implementation structure to increase odds of achieving your desired results
“Strategy is not the consequences of planning, but the opposite: its starting point”

–Henry Mintzberg
Designing the Right Strategy for Your Organization
Why Discuss Strategy?

Strategic thinking and planning are critical to the success of organizations.

A clear understanding of goals and strategies, at all levels of the organization, is critical.

“The essence of strategy is choosing what not to do.”

– Michael Porter
Three Key Components

Plan
• Clear, concise, and written down
• Measureable and managed to metrics

Process
• Participative
• Consistent
• Iterative

Implementation
• Measured
• Communicated and celebrated
Strategic Planning Time Frame

- Rolling three-year plan
- Updated annually and extended
- Provides information for the annual budget and annual plan
- Departmental/location/individual work plan content: Three years and annually
Seven Parts of a Strategic Plan

#1 SWOT ANALYSIS
#2 VISION
#3 MISSION/CORE VALUES
#4 STRATEGIC PRIORITIES
#5 Goals/Strategies
#6 Action Plan
#7 Financial Measures

7 Step Process
Planning Terminology

**Mission:** The purpose of the organization. A simple statement identifying *what* you do and, optionally, who is served by you.

**Vision:** The long-term preferred future or desired destination for the people served (stakeholders, employees, customers, clients, communities). It’s *why* you do what you do. The vision is fundamental to leadership.

**Core Values:** The principles of behavior and action upon which the organization bases its decisions – *how* you do what you do.
Planning Terminology

- **Strategic Pillars**: Broad “Balanced” strategic themes.

- **Strategic Priorities**: Broad priorities, or “big rocks,” on which to focus; high-level goals needed to achieve the vision.

- **Strategies**: Actions necessary to fulfill the strategic priorities.

- **Action Plan**: Task-level activities needed to accomplish the strategies and the strategic priorities, ultimately fulfilling the organizational mission and accomplishing the vision. The action plan uses the present tense in the active voice. A “champion,” along with a target completion date, is identified for each action step/tactic.

**Note**: The action plan is a “living document” that should be routinely updated and revised as time goes on.
The Strategic Planning Team

- Seven to ten participants

- Representation from across the organization

- Strategic planning team members often become critical change agents when action plans are implemented
Successful Strategic Planning

A continuous process, not an event, and critical to long-term success

Plans are living documents and require a strategic mindset

- The plan is only one part of the process
- The process helps invigorate and strengthen organizations

The plan is a part of the overall Strategic Management Process
Successful Strategic Planning

Tiers of an effective strategy are:

- Long-range strategies or strategic priorities
- Individual strategies or short-term goals
- Action plans

Strategic plans enable the pursuit of the Vision
SWOT Analysis
## SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths (Leverage) Internal</th>
<th>Weaknesses (Improve) Internal</th>
<th>Opportunities (Capitalize) External</th>
<th>Threats (Minimize) External</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
Mission
Mission

Mission Statement defines our core purpose

- Inspires change
- Long-term in nature
- Easily understood and communicated
- Written in common/plain language
- Starts with a statement about what we do and who we do it for (use five whys to dive deeply)

Mission Statements answer two questions . . .

- Why do we exist?
- What’s our purpose?
Vision
Vision “paints” the concise picture of what the organization wants to become

- Feasible, “measuring stick”
- Can be as long as 3 or 4 sentences, but is usually less
- Consistent with mission and values
- Inspires all stakeholder

Vision answers two questions:

- What direction are we going?
- What major actions should we take?
Values
Values

Values are timeless principles that guide an organization and shape an organization’s thinking and actions

Examples:
- Integrity
- Caring
- Respect
- Kindness
- Honesty
Strategic Pillars and Priorities
Sample Strategic Pillars

- **Customer**
  - **Financial** – Maintain financial integrity in operations and ensure future growth
  - **Workforce Development** – Develop a work environment that promotes teamwork, empowerment, accountability, and collaboration

- **Culture** – Build a culture of individual and organizational success

- **Quality and Operations** – Achieve a culture of quality and operational excellence by identifying, measuring, and improving performance
Building Engagement at All Levels
Engagement Starts With Involvement!

- Why is involvement necessary?
- How can your staff get involved in the process?
- What contributions could they make to the strategy?
Internal Scan Survey: GPS™ Tool

Process

ABC Community Action Organization’s 2018 GPS Survey consisted of 34 strategies, or best practices, to rate on a scale of 1 to 5 by Importance (how important participants believe the strategy to be relative to their specific Organization) and by Agreement (how strongly participants agree or disagree with each statement relative to their Organization’s practices). Participants were instructed to leave an item blank if they did not know the answer.

Response choices were:

<table>
<thead>
<tr>
<th>Importance Ranking</th>
<th>Agreement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely Important</td>
<td>Strongly Agree</td>
</tr>
<tr>
<td>Important</td>
<td>Agree</td>
</tr>
<tr>
<td>Neutral</td>
<td>Neutral</td>
</tr>
<tr>
<td>Relatively Unimportant</td>
<td>Disagree</td>
</tr>
<tr>
<td>Not Important</td>
<td>Strongly Disagree</td>
</tr>
</tbody>
</table>

The strategies were grouped into seven (7) categories and assigned as follows:

<table>
<thead>
<tr>
<th>Category</th>
<th># Strategies to Assess</th>
<th>Assessed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership/Management</td>
<td>5/4</td>
<td>Management/Employees</td>
</tr>
<tr>
<td>Employee Engagement</td>
<td>7</td>
<td>Management/Employees</td>
</tr>
<tr>
<td>Client Relationship Opportunities</td>
<td>6</td>
<td>Management</td>
</tr>
<tr>
<td>Services and Engagement</td>
<td>3</td>
<td>Management</td>
</tr>
<tr>
<td>Communication Channels and Marketing</td>
<td>4</td>
<td>Management</td>
</tr>
<tr>
<td>Productivity and Efficiency</td>
<td>4</td>
<td>Management/Employees</td>
</tr>
<tr>
<td>Risk Management</td>
<td>5</td>
<td>Management</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>34</strong></td>
<td></td>
</tr>
</tbody>
</table>
Internal Scan Survey: GPS™ Tool

1. 30 of 34 strategies (88%) were ranked 4.0 or higher according to Importance Mean (scale of 1-5).

2. No strategies were ranked 4.0 or higher according to Favorability Mean (scale of 1-5). Generally speaking, strategies ranked 4.0 and above would be deemed strengths.
   - 25 strategies (74%) were ranked between 3.0 and 3.99 according to Favorability Mean.
   - 9 strategies (26%) were ranked below 3.0.

3. Highest ranked strategy according to Agreement Scale (Strongly Agree/Agree):
   - My supervisor provides timely training, coaching, and opportunity to discuss my performance. (68%)

4. Lowest ranked strategy according to Agreement Scale (Strongly Agree/Agree):
   - Dashboards are developed and used to monitor and track performance metrics. (16%)*

   *Note: This strategy was ranked third lowest in importance.

5. Category Ranking (By Favorability Mean)

   Reminder: Not all survey participants were assigned all categories.

<table>
<thead>
<tr>
<th>Category</th>
<th>Favorability Mean</th>
<th>Importance Mean</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership/Management</td>
<td>3.46</td>
<td>4.36</td>
<td>-0.90</td>
</tr>
<tr>
<td>Employee Engagement</td>
<td>3.36</td>
<td>4.30</td>
<td>-0.94</td>
</tr>
<tr>
<td>Client Relationship Opportunities</td>
<td>3.33</td>
<td>4.09</td>
<td>-0.76</td>
</tr>
<tr>
<td>Services and Engagement</td>
<td>3.28</td>
<td>4.50</td>
<td>-1.21</td>
</tr>
<tr>
<td>Communication Channels / Marketing</td>
<td>3.17</td>
<td>3.99</td>
<td>-0.82</td>
</tr>
<tr>
<td>Productivity and Efficiency</td>
<td>3.02</td>
<td>4.38</td>
<td>-1.36</td>
</tr>
<tr>
<td>Risk Management</td>
<td>2.78</td>
<td>4.15</td>
<td>-1.37</td>
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</table>
Incorporating Deliberate Change Management
Change Management Definition

The process, tools, and techniques to manage the people side of change to achieve the required business results.

Individual Perspective
- Understanding how one person makes a change successfully.

Organizational Perspective
- The tools that project teams and managers have to support the “people side” of change.
Your Role in Managing Change

Executives and Senior Managers

Why is this group important?
- Active and visible sponsorship is identified as the top contributor to overall project success in Prosci’s five benchmarking studies
- Senior leaders are one of two preferred senders of messages about change

What is this group’s role?
- Participate actively and visibly throughout the project
- Build the needed coalition of sponsorship with peers and other managers
- Communicate the business messages about the change effectively with employees
Takeaways

What Change Management is:

- Change management focuses on the ‘people side’ of organizational change
- Change management involves both an individual and an organizational perspective
- Change management requires action and involvement by leaders and managers throughout the organization
- Change management and project management are both tools that support project benefit realization – project management is the ‘technical’ side and change management is the ‘people’ side
- Change management is most effective when it is launched at the beginning of a project and integrated into the project activities

Your Change Management Responsibilities:

- Participate actively and visibly throughout the project
- Build the needed coalition of sponsorship with peers and other managers
- Communicate the business messages about the change effectively with employees
Development and Implementation Structure
Don’t Suffer From

IADD

Implementation Attention Deficit Disorder
Overcoming Barriers

What obstacles might you face?

How will you overcome those obstacles?
# The Action Plan

<table>
<thead>
<tr>
<th>Strategic Pillar</th>
<th>Strategic Priority</th>
<th>Owner</th>
<th>Strategies</th>
<th>Start</th>
<th>End</th>
<th>Measure of Success</th>
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</thead>
<tbody>
<tr>
<td>Business and Financial</td>
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<td>Customer</td>
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<td>Process</td>
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<td>Learning and Growth</td>
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<tr>
<td>Culture</td>
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</table>
Move to Action!

What are two things you will do today to drive your strategy?

1.

2.
Questions?
Today’s Presenters

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Thank you!

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