The Playbook: Keeping Strategic Planning Relevant
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• Marketing, Public Relations and Strategic Planning professional for 40 years.
• An INC. Magazine Entrepreneur of the Year
• Managed formal strategic planning during healthcare career including working with Arthur Little, McDonnell/Douglas and Chi Systems
• Managed Strategic Planning for Lincoln Financial Insurance group division
• Facilitated planning processes for many non-for-profits including Nebraska Arts Council, Omaha Symphony, Opera Omaha, Omaha Theater for Young People, Friends of Eppley Cancer Center to name a few.
• Consult on and facilitate leadership development programming with the Collective Leadership Group

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Agenda

- Webinar Objective
- Traditional Strategic Planning
- What’s a Playbook?
- Key Components
- Playbook Template Overview
- Q & A
ON TARGET

• Nonprofit Organizations often lack the time and resources necessary to develop and implement a traditional strategic plan important and central for success.

• Today I’m introducing you to the Playbook concept: “a hybrid document pulling the essential strategic planning components while maintaining the structure of every good plan (Identification, Analysis, Development, Implementation and Evaluation) to guide your organization”
Let’s start with a poll...

• How many of you have a strategic plan?
Traditional Strategic Planning

“A systematic process of envisioning a desired future, and translating this vision into broadly defined goals or objectives and a sequence of steps to achieve them”
Components more or less...

- Vision and Mission
- Situation Analysis: marketing, financial and operating
- Internal and external opportunities and challenges
- Goals and objectives
- Strategies
- Resourcing financial, personnel etc.
- Actions/tactics and responsibilities
- Measurement
Roles and Processes (Bob’s perspective)

- Any Executive Director was hired to further the organization’s mission and by default owns the development and implementation of a plan.
- First planning effort/draft should be internal (Executive Director and Staff). Staff knows what’s needed and possible.
- Board’s input necessary at the appropriate time as other stakeholders plus approval of final draft.
- Board Strategic Planning task force could be valuable.
- Outside facilitator could be helpful.
Basic premise of the playbook concept is to simplify a plan into actionable decisions focusing all stakeholders on primary projects for the organization’s sustainability and success utilizing a PowerPoint template.
Playbook formula...

- Identification
- Analysis
- Development
- Implementation
- Evaluation
Identification

• Vision and/or Mission... or Positioning Statement
  ▪ From all audiences perspective, define scope and purpose of all the organization’s activities based on core beliefs
  ▪ Points of Differentiation
    - *Why we exist versus another similar organization*

• Audience/stakeholder Segmentation
  ▪ Primary and secondary ties directly to above
For over forty years, our volunteers have been the voice to the local and regional community on behalf of the Eppley Cancer Center as well as an important fundraising arm. Also, we are advocates, educators and promoters of our nationally recognized Center. We focus on message on the great Center’s work in cancer research and patient care. We educate and promote the Center’s recognized reputation in specific cancer studies, including lymphoma, pancreatic, breast, head and neck, lung, prostrate, GYN and brain cancers. We are passionate and volunteer for this work from our hearts and life experiences with cancer.
Analysis (needed for context)

- **Financial and Operating Analysis**
  - Historical financial analysis, trending
  - Historical operating analysis
  - Benchmarks (industry standards)

- **Strategic assumptions**
  - Economic Assumptions
  - Industry Assumptions
  - Technology Assumptions
  - Political/Regulatory Assumptions
  - Demographic and Customer Assumptions

- **Forces at Work**
  - Market Recession
  - Limited resources
Development

• Define Objective (2 - 3 year max.)

  could be...

  • Financial:
    - Focus on growth
    - Focus on expenses
    - Earned and unearned revenue
  • Marketing and promotion
  • New or improved programs
  • Change in clientele or audiences
  • Focus on facilities, repair or new
  • Other
Implementation

- Identify Strategies to define approach to meet Objectives
- Identify Actions to achieve strategies and ultimately Objectives
- Identify Gaps or Issues Supporting or Hindering Actions
- Identify Timing
- Status checks in process of meeting deadlines
Evaluation

- **Qualitative:**
  - Informal and formal feedback
    - Interviews with individuals
    - Focus groups
- **Quantitative:**
  - Metrics, ex. Number served
  - Meeting strategy deadlines
  - Survey of key stakeholders
Vision and/or Mission and/or Positioning Statement

- From all audiences perspective, define scope and purpose of all the organization’s activities based on core beliefs
- Points of Differentiation
  - Why we exist versus another similar organization
Audiences and/or Key Stakeholders

• Audience/Stakeholder Segmentation
  – Primary and secondary
Objectives

• Focus on growth
• Focus on expenses
• Earned and unearned revenue
• Marketing and promotion
• New Programs
• Improve Programming
• Change in clientele or audiences
• Focus on facilities
<table>
<thead>
<tr>
<th>Strategy</th>
<th>Gaps/Issues</th>
<th>Actions</th>
<th>Timing</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>General approach to achieve above objective</td>
<td>Internal or external forces impacting this action</td>
<td>Specific action(s) to achieve strategy</td>
<td>Quarterly or yearly</td>
<td>See below</td>
</tr>
</tbody>
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**Example:** Develop existing member retention campaign

- Member database hasn’t been updated for years
- Survey existing and lapse members to identify reasons for staying or leaving plus validation of potential incentives to stay or return
- Q3, 2014
Playbook Guidelines:

- Spend time on defining organization and audience segmentation, it’s the foundation of the plan
- Reach consensus on all objectives, they should tie directly to key stakeholders: clientele, staff, funders, etc.
- Minimize number of objectives, focus on key issues
- Start all actions with verbs
- Keep timing general, e.g. quarterly, seasonally, annually versus specific date and time
- Add visuals, e.g. pictures related to mission or objectives
- Keep it simple and alive, change when issues or opportunities impact it!
Playbook Advantages:

- Keeps all involved focused on key objectives minimizing derailments
- Creates metrics for moving forward with consensus
- Good document for staff meetings
- Great Board Report, keeps Board members informed and focused
- Good for performance evaluations
- Use it for orientation for new staff, funders and board members
- Good marketing tool.
THANK YOU

If you have further questions and/or want a copy of the playbook template. Please feel free to contact me at askbob@culver.com
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