

Actionable Strategic Plan Principles

Introduction. An actionable plan should: (a) be primarily focused on the next 3-5 years, (b) be relatively short (~3-4 pages), (c) be an effective management tool for allocating resources, and (d) make the PURPOSE of the organization clear. Purpose brings your group together and connects the day-to-day to the higher-level goals of the organization – something that really motivates people (even beyond money). This plan should be so reflective of an organization's purpose that it is the first thing you give prospective employees. Developing the plan together ensures buy-in and typically reinvigorates staff by making it clear the organization could not prosper without their contribution. The last thing you should do in the process is actually write the plan. It all starts by brainstorming about purpose.....

1. **Organizational Purpose.** Defining purpose must consider:
 - a. **Core Values:** What would you retain even in the face of huge impacts (what can your staff always count on)?
 - b. **Product/Services and Customers:** What are you offering, who pays for them, who uses them, and what does the user experience?
 - c. **Value Proposition:** How would you differentiate your products/services from other competitors (pick one approach as your primary approach)? This should resonate more with your customers (versus the management team).
 - i. Cheapest Price (e.g., Walmart, McDonalds).
 - ii. Cutting Edge Products (e.g., Intel, Apple).
 - iii. Highest Customer Service (e.g., Ritz Carleton, Burger King).
2. **Build From the Bottom Up.** For each of the products/services (user experiences) you think are important, answer questions 2a-f below very briefly (a sentence or a few words) and in language that is understandable by anyone. Be very honest whether these are really your users, are you really providing what you say you are, and whether these users will really value these experiences (i.e., will they fight for it if it is threatened, can they do their jobs without it, etc).
 - a. What are your core values (see 1a)?
 - b. What does the user experience?
 - c. Who raises the money to produce the experience?
 - d. Who actually pays for the experience?
 - e. Who is the actual user?
 - f. How will you differentiate your user experiences from other competitors (see 1c)?
3. **Vision/Mission Statements (V/M).** When you finish answering 2a-f, underline all the key words or phrases that you think will be critical to your success. We are underlining these key words because they are the areas we will make investments in and track their performance – these are truly key. This may seem silly, but this is important if you are going to make this a real management tool. These key words must be reflected in all vision, mission, goals, and objective statements. They will “connect” the day-to-day activities to

the organization's vision. Write preliminary vision (5-10 years) and mission (3-5 years) statements based on the output from 2a-f. Don't include anything that can't be measured, isn't fully in your control, and it must be in the "actionable format": "**Achieve a goal BY taking a clearly defined action BY a specific date or period.**"

4. **Goals.** Once you are comfortable with the V/M statements, create the goals and sub-goals (objectives) required to achieve the V/M statements. They must also be in the actionable format and use the same key words from the V/M statements (i.e., the goals and objectives must clearly link to the V/M statements). Again, the key word linkage is critical to tie the day-to-day to the higher level vision, mission, and goals – the threads between these various levels.
5. **Staff Responsibilities.** Each goal and objective should be assigned to specific individuals or groups.
6. **Metrics.** Developing metrics should not be a goal or objective -- metrics are embedded in each goal and objective – you are measuring how you are achieving a goal BY the specific actions highlighted in these statements. You'll need to clearly identify these metrics so staff know what they are being held accountable for.
7. **Start Writing.** Once you are comfortable with your V/M statements, goals, and objectives and with how they can be measured – you are ready to start writing this down into an actual plan. Basically, what you have brainstormed with a short introduction.
8. **Apply it.** Give yourself some time, but if you aren't using this plan to allocate resources or monitor progress in the next few months then you haven't really gotten the benefit from the process. Another round?