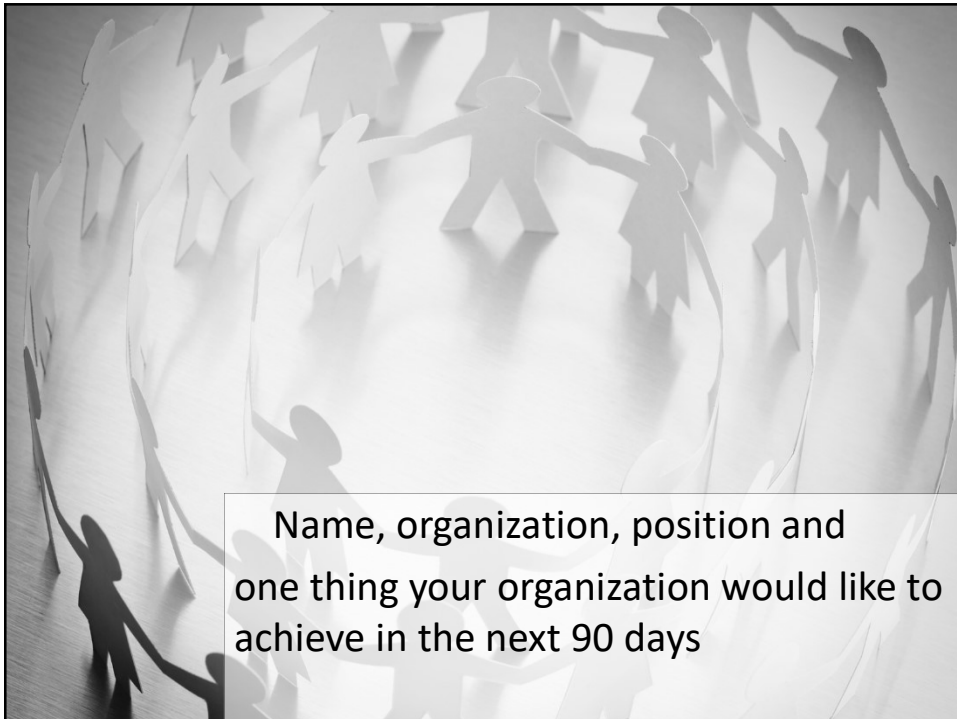
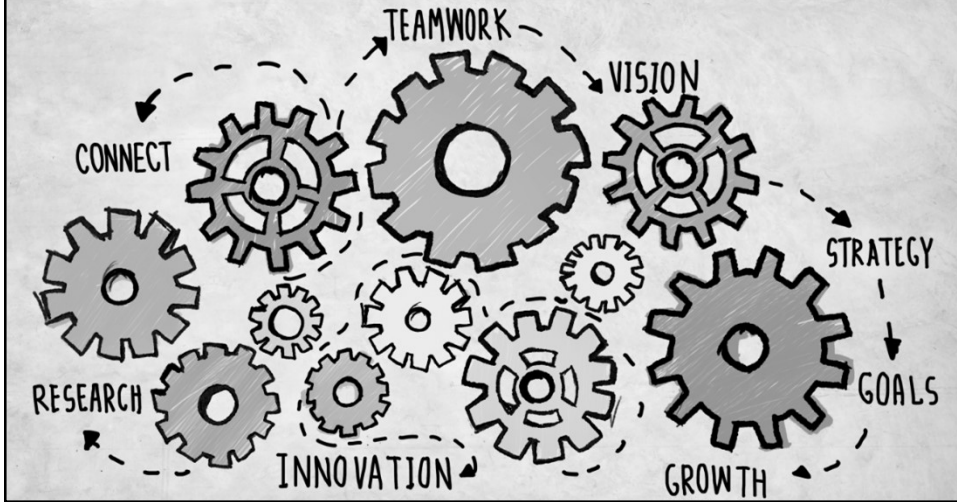


Strategy for Increased Social Impact

Lyn Corbett, The Pivotal Group Consultants Inc.



Name, organization, position and one thing your organization would like to achieve in the next 90 days

LEARNING OBJECTIVES



1. Understand the need to think strategically on an ongoing basis even outside of the formal strategic planning process
2. Identify tools and practices of good strategy and learn how to implement them in your organization
3. Be introduced to an alternative approach to the traditional strategic planning process

Mission, Vision, Values & Strategy

Mission – the societal need the organization meets; answers the question, “why?”

Vision – what the organization should look like, feel like, be doing and be like at a point in the future

Values – the guiding principles, core beliefs and behaviors that govern how an organization works; these can be internal, external or both

Strategy – 

Adapted from the Steven Alexander group
Strategic Planning Terms and Process

Strategy – The Missing Component



STRATEGY:

Strategy is a coordinated set of actions aimed at creating and sustaining a competitive advantage in carrying out the nonprofit mission.

-David La Piana
The Nonprofit Strategy Revolution



Core Values				
truth	persistence	resources	community	strength
efficiency	sincerity	dependability	integrity	self-control
initiative	fun	trust	peace	cleverness
relationships	excellence	loyalty	success	Stewardship
power	wisdom	teamwork	clarity	Environmentalism
control	flexibility	service	security	
courage	perspective	profitability	love	
competition	commitment	freedom	determination	
excitement	recognition	friendship	order	
creativity	learning	influence	spirituality	
happiness	honesty	justice	adventure	
honor	originality	quality	cooperation	
innovation	candor	hard work	humor	
obedience	prosperity	responsiveness	collaboration	
financial	growth	respect	fulfillment	
community	purposefulness	support	fairness	

Catalytic Questions



What three adjectives or short phrases best characterize this organization?

What will be most strikingly different about this organization in five years?

What is the biggest gap between what the organization claims it is and what it actually is?

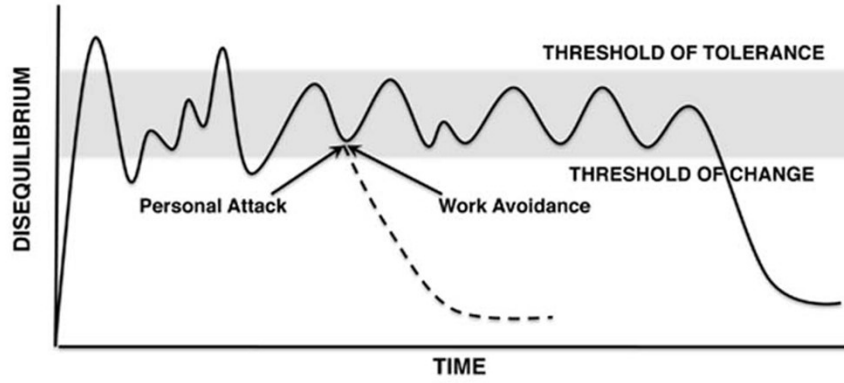
How would we respond if a donor offered a \$50-million endowment to the one organization in our field that had the best idea for becoming a more valuable public asset?

Culture of Inquiry Checklist

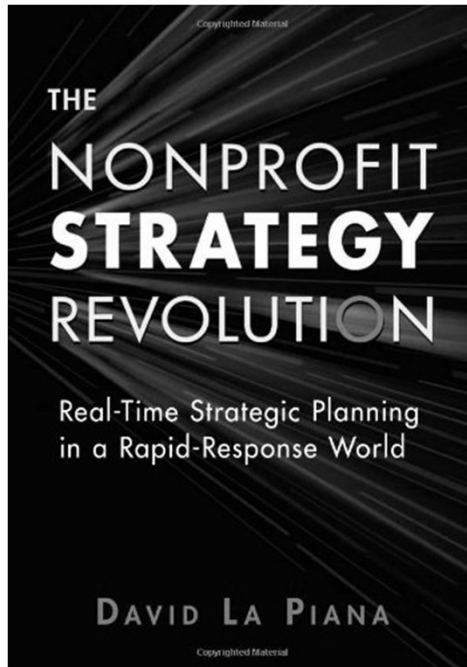


- Questions are welcomed
- Differing viewpoints are encouraged
- Unwritten rules are explained
- Timely information exchanges
- Open communication
- Actively seek different viewpoints
- Tolerate ambiguity
- Brainstorm silently and openly
- Consult outsiders
- Search widely for information









Adaptive Learning



Source: Heifetz & Linsky: Leadership on the Line, 2002



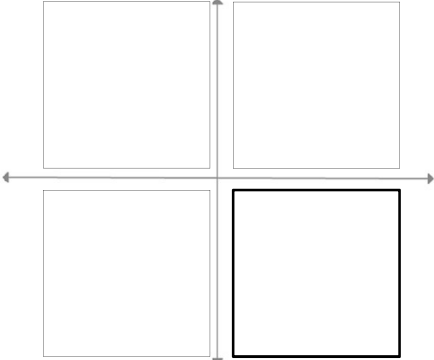
Current Business Model

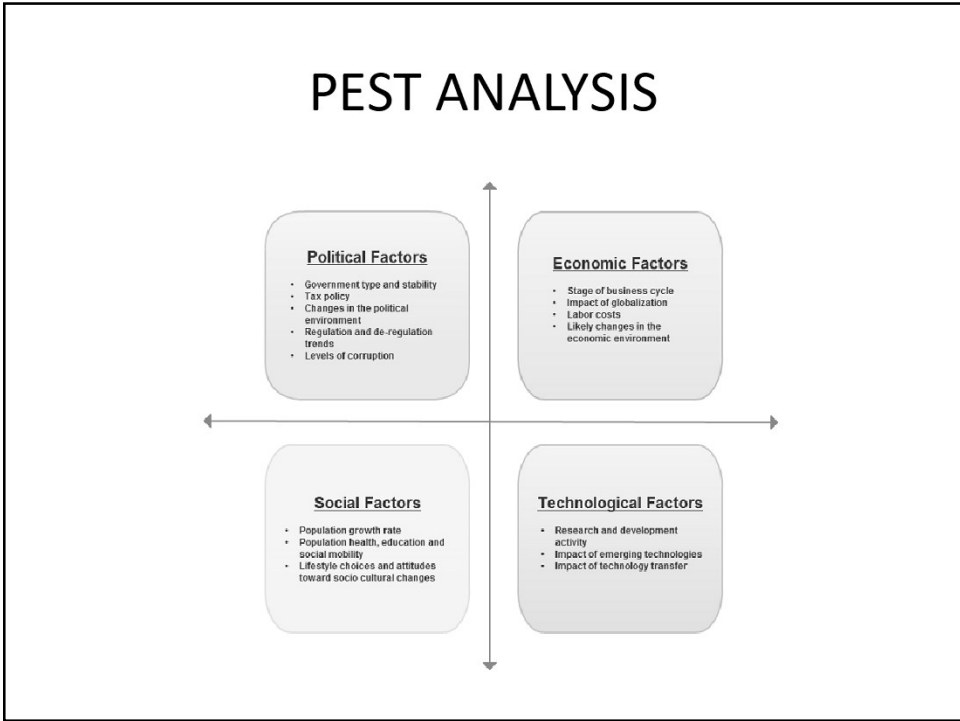
Scope	Includes	Does <u>not</u> include
Where 	Areas we serve:	Areas we do not serve: 
Who 	Customers, clients, or audience that is an important focus for us:	Customers, clients, or audience that we do not focus on serving: 
What 	Primary program/service areas:	Programs/services we do not offer: 
How 	Current sources of funding and why we pursue these sources:	Funding sources we do not have or seek: 

Other Tools:
Funding Sources
Trend Analysis
Competitor Analysis

Real Time Strategic Planning
LaPiana Consulting

PEST ANALYSIS





- ## Political
- ecological/environmental current legislation
 - future legislation
 - international legislation
 - regulatory bodies and processes
 - government policies
 - government term and change
 - trading policies
 - funding, grants and initiatives
 - home market pressure- groups
 - international pressure- groups
 - wars and conflicts

Economical

- home economy
- economy trends
- overseas economies
- general taxation
- taxation specific to product/services
- seasonality issues
- market/trade cycles
- specific industry factors
- market routes trends
- distribution trends
- customer/end-user drivers

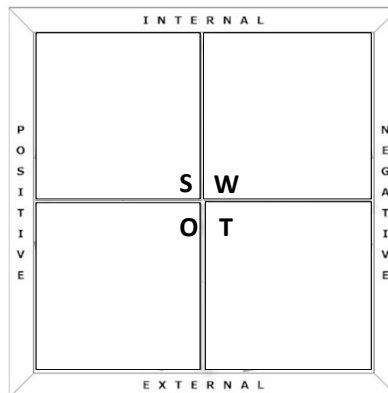
Social

- lifestyle trends
- demographics
- consumer attitudes and opinions
- media views
- law changes affecting social factors
- brand, company, technology image
- consumer buying patterns
- fashion and role models
- major events and influences
- buying access and trends
- ethnic/religious factors
- advertising and publicity
- ethical issues

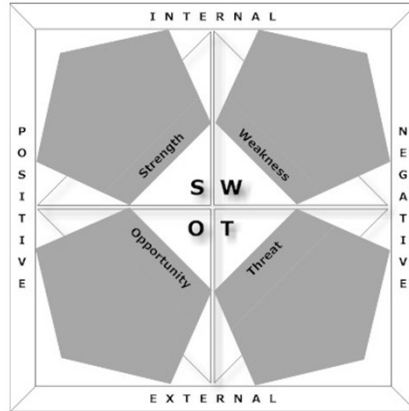
Technology

- competing technology development
- research funding
- associated/dependent technologies
- replacement technology/solutions
- maturity of technology
- manufacturing maturity and capacity
- information and communications
- consumer buying mechanisms/technology
- technology legislation
- innovation potential
- technology access, licensing, patents
- intellectual property issues
- global communications

SWOT Analysis



SWOT Analysis



Strengths

- | | |
|--|---|
| <ul style="list-style-type: none">• Advantages of proposition?• Capabilities?• Competitive advantages?• Resources, Assets, People?• Experience, knowledge, data?• Financial reserves, likely returns?• Marketing - reach, distribution, awareness?• Innovative aspects? | <ul style="list-style-type: none">• Location and geographical?• Price, value, quality?• Accreditations, qualifications, certifications?• Processes, systems, IT, communications?• Cultural, attitudinal, behavioral?• Management, succession?• Philosophy and values? |
|--|---|

Weaknesses

<p>Gaps in capabilities? Lack of competitive strength? Reputation, presence and reach? Financials? Own known vulnerabilities? Timescales, deadlines and pressures? Cashflow, start-up cash-drain?</p>	<p>Continuity? Effects on core activities, distraction? Reliability of data, plan predictability? Morale, commitment, leadership? Accreditations, etc? Processes and systems, etc? Management cover, succession?</p>
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Opportunities

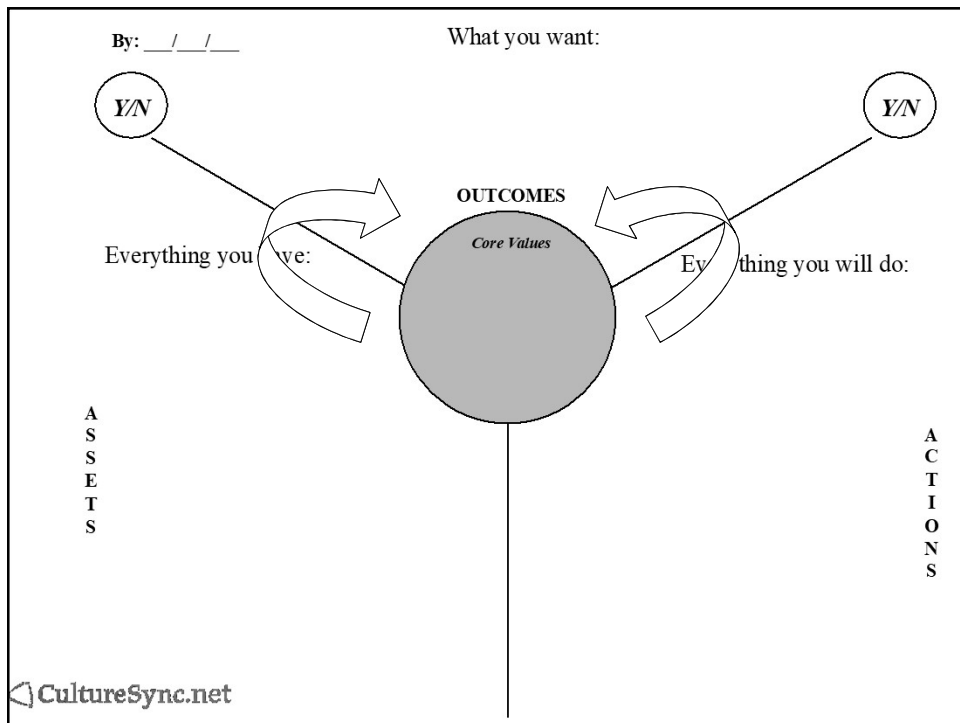
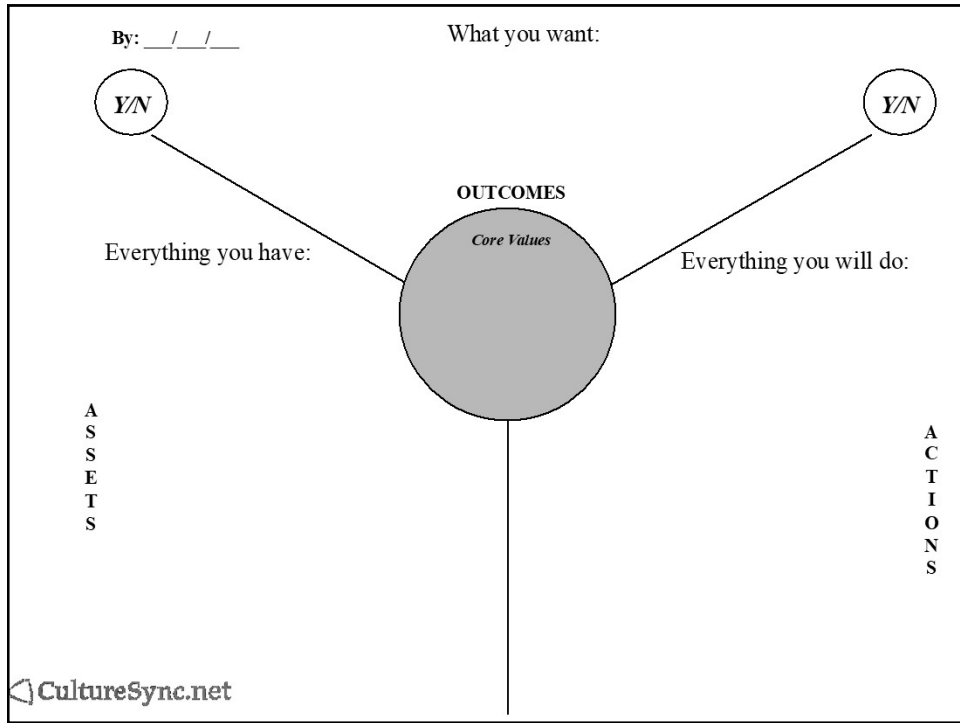
<p>Market developments? Competitors' vulnerabilities? Industry or lifestyle trends? Technology development and innovation? Global influences? New markets, vertical, horizontal? Niche target markets? Geography?</p>	<p>Tactics: e.g. surprise, major contracts? Business and product development? Information and research? Partnerships, agencies? Other influences?</p>
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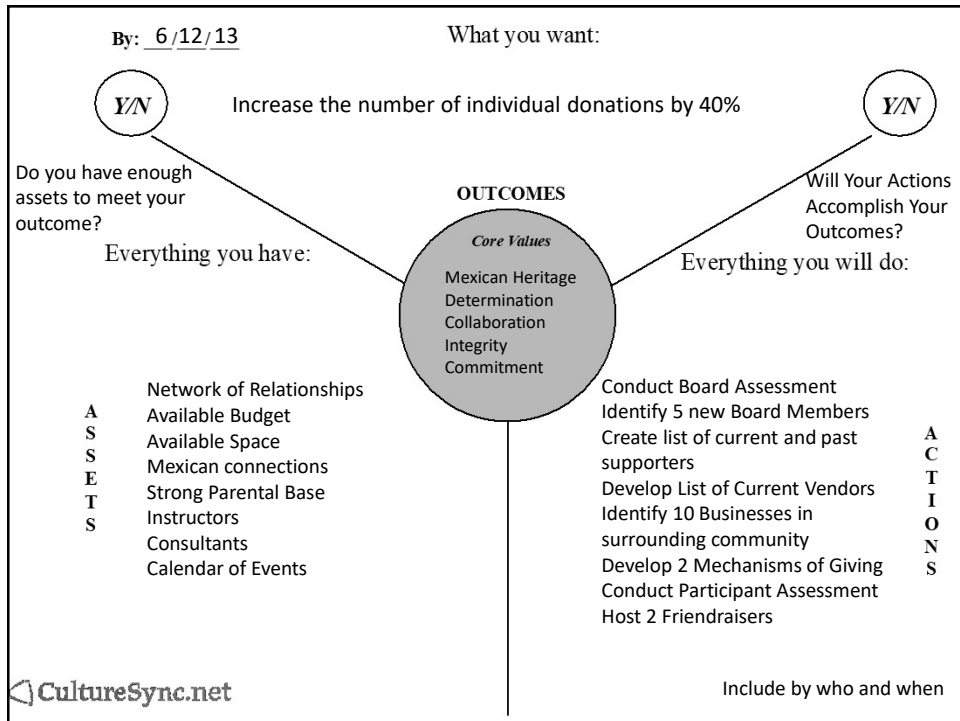
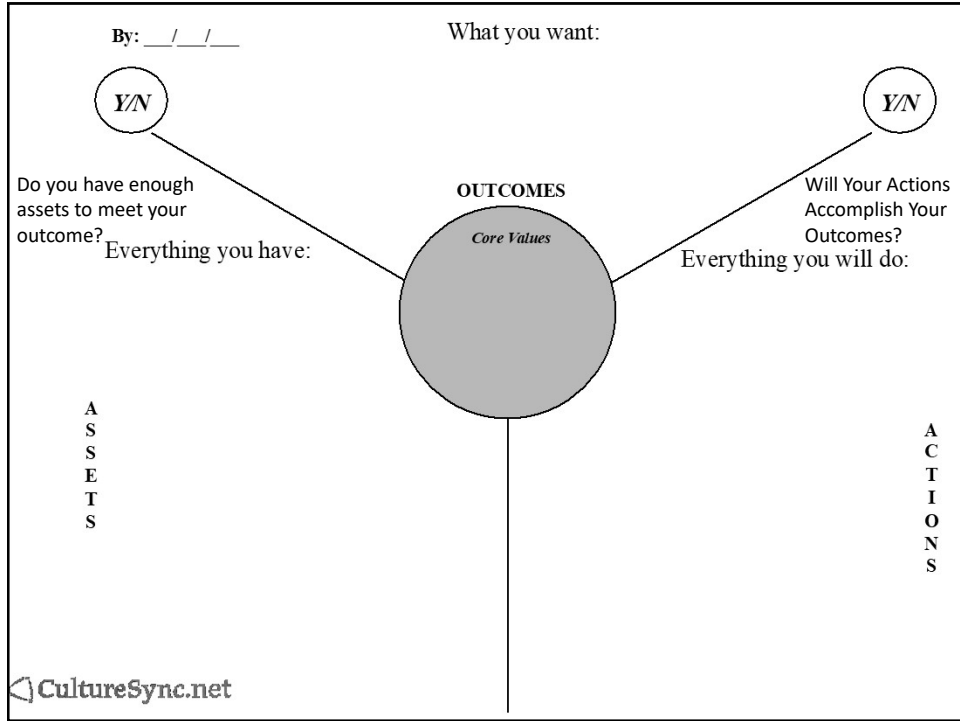
Threats

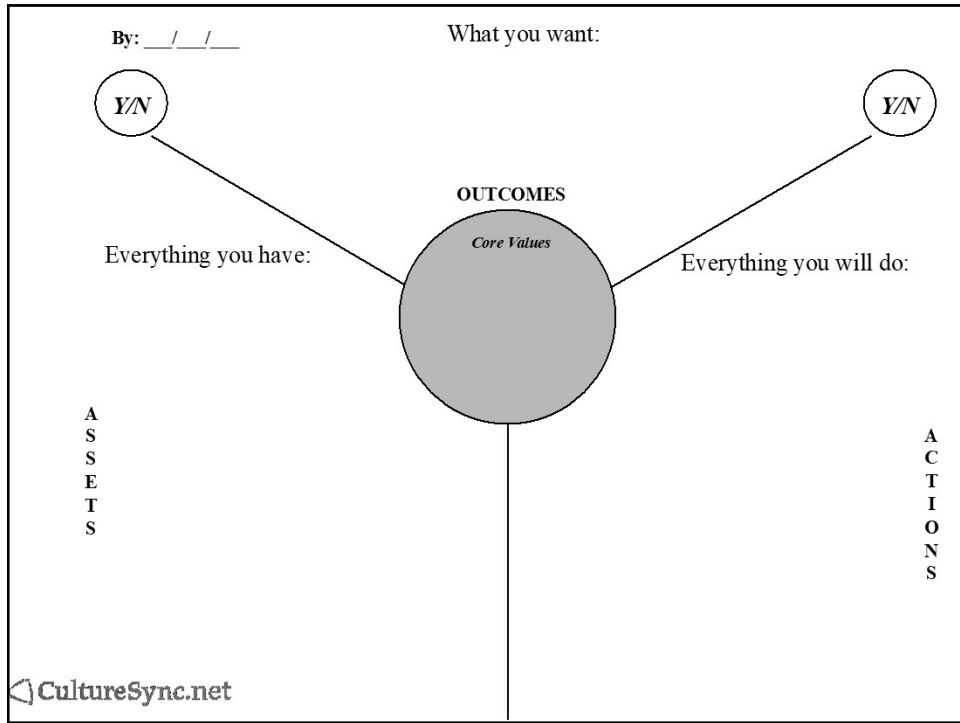
Political effects? Legislative effects? Environmental effects? IT developments? Competitor intentions - various? Market demand? New technologies, services, ideas?	Vital contracts and partners? Sustaining internal capabilities? Obstacles faced? Insurmountable weaknesses? Loss of key staff? Sustainable financial backing? Economy - home, abroad? Seasonality, weather effects?
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90 Day Micro Strategy Model





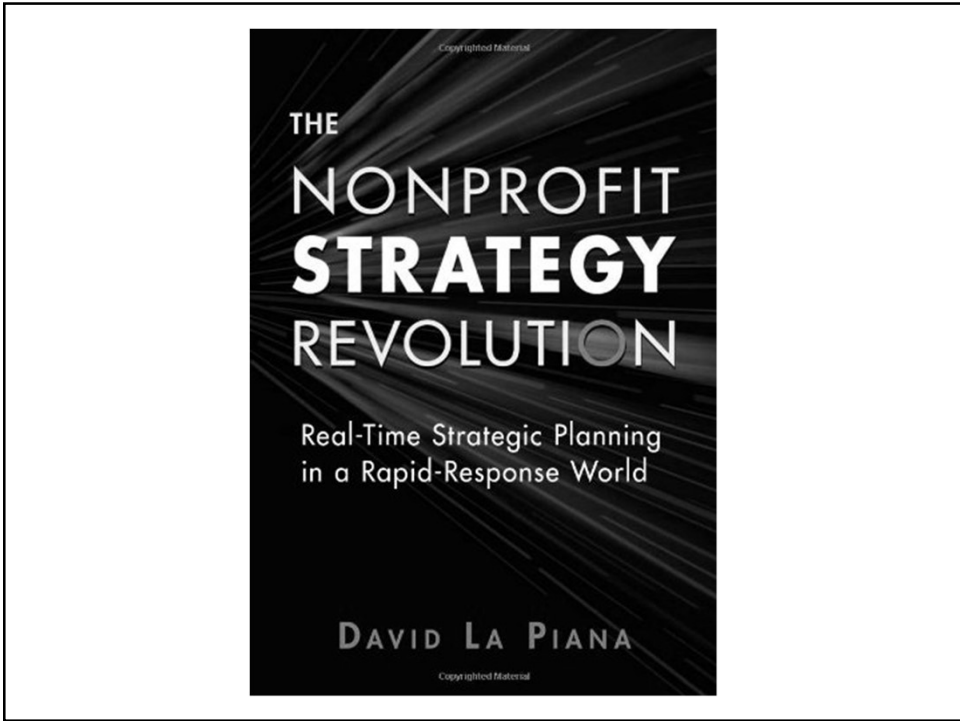


Strategic Planning



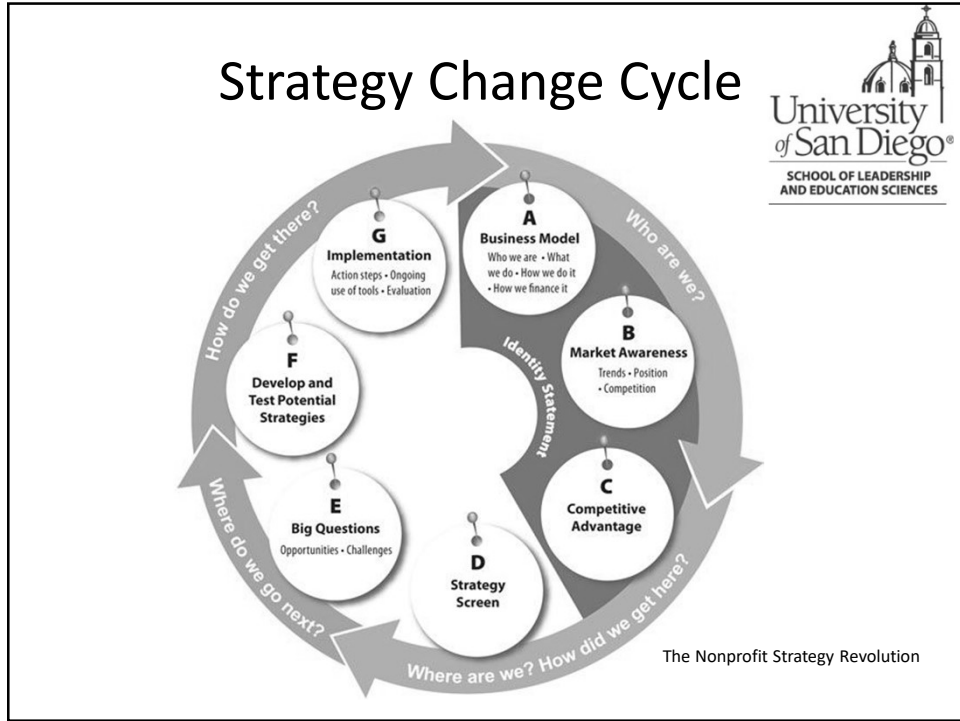
Strategic planning focuses on establishing your organizational direction, setting priorities and identifying obstacles and opportunities that may limit or enable your to carry out its mission.

-TCC Group



Traditional Strategic Planning





What is Strategy Built Upon?

A Sound Business Model = being clear about

- Who we are (our mission/vision)
- What we do (our program)
- How we do it (our structure and operations)
- How we finance it

Market Awareness = knowing

- What the market is
- Where we are in the market
- How we got there
- Where we want to go next

Competitive Advantage = the ability to produce social value by

- Using a unique asset (such as a strength that no other similar organization in your geographic area has) and/or
- Having outstanding execution (such as being faster or less expensive, or having better service, than other similar organizations in your geographic area)

Destroyers of Strategy



- ✓ Shortage of time
- ✓ Vanishing culture of inquiry
- ✓ Avoidance of risk taking
- ✓ Lack of involvement of board in strategy and strategic planning
- ✓ Lack of vision and focus on the future
- ✓ Habit of holding on to old ways



Where do we go from here?

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CORE VALUES

truth	persistence	resources
efficiency	sincerity	dependability
initiative	fun	trust
environmentalism	relationships	excellence
power	wisdom	teamwork
control	flexibility	service
courage	perspective	profitability
competition	commitment	freedom
excitement	recognition	friendship
creativity	learning	influence
happiness	honesty	justice
honor	originality	quality
innovation	candor	hard work
obedience	prosperity	responsiveness
financial	growth	respect
fulfillment	community	support
integrity	order	strength
peace	spirituality	self-control
loyalty	adventure	cleverness
clarity	cooperation	success
security	humor	stewardship
love	collaboration	support
determination	fairness	purposefulness

By: __/__/__

What you want:

Y/N

Y/N

OUTCOMES

Core Values

Everything you have:

Everything you will do:

A
S
S
E
T
S

A
C
T
I
O
N
S