

STRATEGIC ENROLMENT MARKETING & MANAGEMENT FORUM

PRE-CONFERENCE WORKSHOP

PRESENTED BY



Strategic Planning for Post-Secondary Professionals

Graham Donald
Brainstorm Strategy Group Inc.



Agenda

1. Introductions & Overview
2. Introduction to Strategic Planning: Preparing for Success
3. Defining Your Mission & Vision
4. Environmental Scan & Engaging Stakeholders
5. Setting Strategic Priorities & Giving Structure to Your Plan
6. Engaging Your Team in Implementation

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Introductions

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Research, strategic advising, and training to accelerate the work of the employers that hire students and the institutions that educate them and support their development.



What are your challenges?

- What are the big picture challenges?
- What are your greatest weaknesses?
- What is your “weakest link”?

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What is your opportunity?

- What is your biggest potential impact?
- How would your work change?
- Who would be involved?

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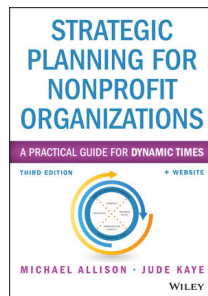
Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice, and discipline.

- Jim Collins, *Good to Great and the Social Sectors*

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Key Resources



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Good to Great and the Social Sectors, Jim Collins
The Five Most Important Questions, Peter F. Drucker et al
The Three Signs of a Miserable Job, Patrick Lencioni

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Strategic Planning Overview: Preparing for Success

"That which is measured improves. That which is measured and reported improves exponentially."

- Karl Pearson

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Succeeding with Strategic Planning

- What are your past experiences with Strategic Planning?
- Barriers to success in the planning process
- Barriers to success in implementation

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“Nothing is ever created that isn’t
imagined first.”

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Why do it?

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Why do it?

- To get where you want to be, not just where you are going
- Improves focus and improves the process of people working together:
 - Explicit understanding of purpose, business and values
 - Facilitates decision making
 - Provides milestones and measures to assess results
 - Supports marketing and communications
 - Brings everyone together to create and pursue opportunities to better meet the needs of clients
- Engages your stakeholders & increases their commitment
- To move from being REACTIVE to PROACTIVE
- CLARITY

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Why Now?

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What is Strategic Planning?

- a management tool
- a communications device
- a leadership process
- a change catalyst
- a stakeholder engagement opportunity

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What is Strategic Planning?

*“Planning is bringing the future into the
present so you can do something about it
now.”*

- Alan Lakein

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What is Strategic Planning?



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“This one goes to eleven.”



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What is Strategic Planning?

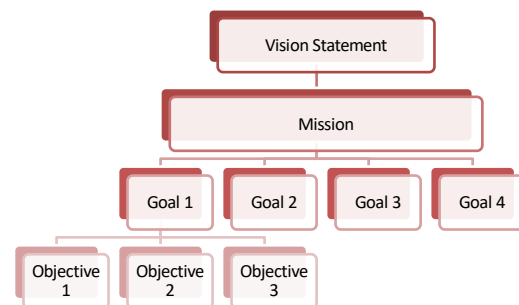
Strategic planning is a systematic process through which an organization agrees on – and builds commitment among key stakeholders to – priorities that are essential to its mission and are responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities.

- Michael Allison & Judy Kaye, *Strategic Planning for Nonprofit Organizations*, 2nd edition

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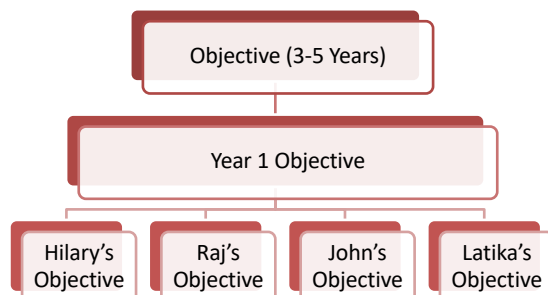
Strategic Plan (3-5 Years)



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Individuals' Objectives in the Plan



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Key Terms

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Steps in Strategic Planning

1. **Getting Ready**
2. Creating Mission & Vision
3. Environmental Scan & Stakeholder Input
4. Setting Priorities
5. Writing the Plan
6. Implementing the Plan

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Getting Ready to Plan

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Considerations

- Goals and objectives should be largely within our control (i.e. they should not be based on some imaginary funding)
- Deciding what to “stop doing” can be as important as deciding what *to do*
- Big things can be accomplished when they are broken down into a series of smaller things

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Getting Ready

- Identify the reasons for planning
- Check readiness to plan
- Determine who should be involved
- Summarize department/office history and profile
- Identify information needed
- Write a plan for planning

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Your Reasons for Planning

- What would success look like at the end of the planning process? What do you hope to achieve from the planning process?
- What issues or choices need to be addressed?
 - Why is it an issue?
 - Strategic or operational?
- Any non-negotiables?

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Readiness & Willingness to Plan

- Commitment from leadership?
- A willingness to be inclusive and encourage broad participation
- An adequate commitment of resources (time, research)
- A team that understands the purpose of planning
- A willingness to challenge the status quo

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Determine Who Should be Involved

- Roles:
 - Leadership
 - Facilitation
 - Input
 - Decision-making
- Internal & External

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Defining Your Mission

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The Mission Statement

- Purpose
 - Why do you exist?
- Business
 - What business are you in?
- Values, Beliefs & Assumptions

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Purpose

- Why does your office/department exist?
- What is your focus problem?
- What do you hope to achieve?
- Who is your primary customer/client?
- Do you have secondary customers/clients?

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Purpose Statement Structure

- An infinitive verb that indicates change (to increase, to eliminate, to prevent, etc.)
- Identification of the problem to be addressed, or condition to be changed

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Purpose Statement

- Our mission is to increase/engage/change...

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What Business are You In?

- Where purpose is the “end” you plan to achieve, business is the “means” to get there
- This may reflect your primary or core programs in general terms
- Often includes the verb “to provide” or a link to the purpose statement with “by” or “through”

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The Business We Are In...

... We do this by providing/providing/delivering/
initiating/creating...

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Values, Beliefs and Assumptions

- What themes guide your work?
- What do you want all of your staff to consider when working with clients?
- What do you want other parts of the business to understand about the way you operate?

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Greatness is an inherently dynamic
process, not an end point. The
moment you think of yourself as
great, your slide toward mediocrity
will have already begun.

- Jim Collins

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Leading Your Team with a Clear Vision

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If you want to build a ship, don't
drum up the people to gather
wood, divide the work, and give
orders. Instead, teach them to
yearn for the vast and endless
sea.

- Antoine De Saint-Exupery, *The Little Prince*

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The Vision Statement

- A guiding image of success formed in terms of a contribution to the organization
- You will never be greater than the vision that guides you
- What will success look like?
- A vision should challenge and inspire the group to achieve its mission

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The Value of a Vision

- Provides clarity, guidance and inspiration
- Your vision will help to determine your priorities and decide to where to invest your resources
- The process of creating the vision can itself add value

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What is Your Vision?

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Environmental Scan & Engaging Stakeholders

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Who are your stakeholders?

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How can you engage stakeholders?

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Environmental Scan

- Input from internal stakeholders
- Input from external stakeholders
- Objective research & information
- Sharing with other institutions

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External Input

- Gather external stakeholders' perspectives
 - Students
 - Government
 - Departments/faculties
 - Organizational leadership
 - Similar departments/offices at other institutions
 - Families
 - Others?

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Customer Value

"What does the customer value?" may be the most important question. Yet it is the one least often asked. Nonprofit leaders tend to answer it for themselves. "It's the quality of our programs. It's the way we improve the community." People are so convinced they are doing the right things and so committed to their cause they come to see the institution as an end in itself. But that's a bureaucracy. Instead of asking, "Does it deliver value to our customers?" they ask, "Does it fit our rules? And that not only inhibits performance, it destroys vision and dedication..."

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Customer Value

... What customers value – what satisfies their needs, wants, and aspirations – is so complicated that it can be answered only by customers themselves. And the first rule is that there are no irrational customers. Almost without exception, customers behave rationally in terms of their own realities and their own situation. Leadership should not even try to guess at the answers -- it should always go to the customers in a systematic quest for them. When board members, staff, and your customers together shape the mission and the goals, you create an organizational direction with passion and energy behind it that carries you even further than you can imagine.

— Frances Hesselbein and Peter F. Drucker

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Internal Analysis

- Gather input from internal stakeholders
 - SWOT analysis
 - Self-assessment of management
 - Staff input on programs
 - Program assessment
 - Assess financial performance
 - Assess use of other resources

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S.W.O.T.

	Helpful	Harmful
Internal	STRENGTHS 1. 2. 3. 4.	WEAKNESSES 1. 2. 3. 4.
External	OPPORTUNITIES 1. 2. 3. 4.	THREATS 1. 2. 3. 4.

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Setting Priorities

“If we do not change our direction,
we are likely to end up where we are
headed.”

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Evaluating Options & Setting Priorities

- Interplay of SWOT
- Prioritize programs
- Overall goals & objectives
- Management/operational goals & objectives
- Team/individual goals & objectives
- Long-range financial projections
- Write the plan!

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Interplay of SWOT

	Opportunities	Threats
Strengths	Invest	Defend
Weaknesses	Decide	Damage Control/Divest

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Goals & Objectives

- Goals (4-6)
 - An outcome statement that defines what an organization is trying to accomplish with its programs or management functions
 - i.e. Increase our students' understanding of their interests and the opportunities available to them
- Objectives
 - A precise, measurable, time-phased result that supports the achievement of a goal
 - i.e. Provide our interests assessment workshop to 300 students per quarter (*with an 85% satisfaction rating*)

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Next Steps

- Develop long-range financial projections
- Write the plan!

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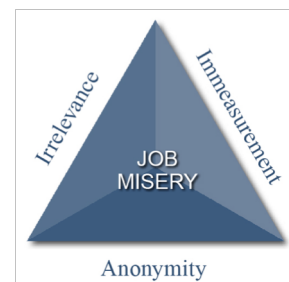


Engaging Your Team in Implementing Your Plan

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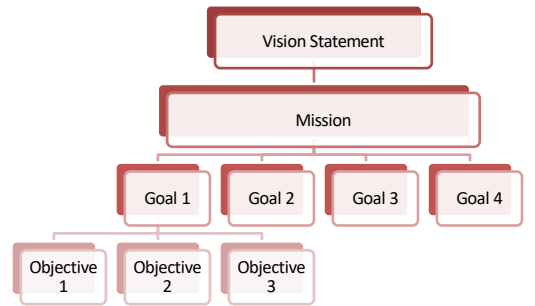
The Three Signs of a Miserable Job



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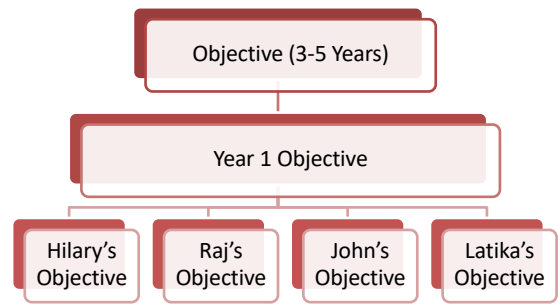
Strategic Plan (3-5 Years)



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Individuals Objectives in the Plan



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Performance Self-Management Process

- This process is designed to:
 - Give every member of the team greater ownership of results
 - Reassure staff that the process will be fair and objective
 - Ensure the performance discussions happen by sharing the workload
 - Eliminate surprises
 - Build on a basis of trust in one another's abilities
 - Maintain focus on the strategic objectives of the whole office

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Creating Objectives

- Team discussion of career centre goals and objectives; determine who is responsible for which objectives
- Staff draft personal objectives; actions; and measures
 - 3-5 personal performance objectives
 - 1-2 professional development objectives
- Staff and manager sign off shared document
- Quarterly meetings (30 minutes) are booked at the beginning

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Sample

Objective: Develop and deliver 8 new workshops in the next 3 years

Objective	Measures	Actions	Status
Develop 3 new workshops and deliver each twice in 2012	Far Exceeds: 4 workshops delivered 3 times each Exceeds: Either more than 3 workshops delivered or 3 delivered more than twice each Meets: 3 new workshops delivered twice Below: Anything less	Q1: Survey to determine which of 8 workshop ideas to pursue first Q2: Develop test at least two workshops and deliver one Q3: All 3 workshops developed, evaluated, refined; one delivered Q4: All 3 delivered	Q1 Notes: Q2 Notes: Q3 Notes: Q4 Notes:

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It doesn't matter if you can quantify your results. What matters is that you rigorously assemble evidence – quantitative or qualitative – to measure your progress.

- Jim Collins

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Planning Process Examples

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Very Concise Planning Process

1 day retreat; all staff & director

- intro, current status, org history, meeting objectives
- staff presentations on programs/services; client needs and challenges
- mission statement development
- vision statement brainstorm
- SWOT discussion
- Discussion of key issues/challenges
- Agreement on major goals and program priorities
- Identification of next steps and areas for further discussion; decision on who/how text will be pulled together

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Mid-Length Planning Process

The “very concise” process, plus:

- Additional preparation work on analyzing current programs & services
- Advance interviews/discussions with some key stakeholders (administrators, student groups, etc.)
- Some analysis of existing research
- Retreat agenda, spread over two days; deeper discussion of client and stakeholders needs and interests
- Additional post-retreat meeting to review draft document together

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Full Strategic Planning Process

The “mid-length” process plus:

- Additional research: focus groups with employers and clients/potential clients
- Additional interviews/discussions with stakeholders unwilling/unavailable for focus groups
- Surveys of employers, clients, others OR greater analysis of existing research
- Discussion & learning from other career offices
- Retreats days separated by several weeks with sub-group work in between

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Sample Retreat Agendas

- | | |
|-------|---|
| Day 1 | <ol style="list-style-type: none"> 1. Strategic planning overview 2. Discussion of planning objectives & expected outcomes 3. Development of a <u>draft</u> Mission Statement 4. Development of a <u>draft</u> Vision Statement 5. First steps in the Environmental Scan |
| Day 2 | <ol style="list-style-type: none"> 6. Review results of the Environment Scan <ul style="list-style-type: none"> ○ Stakeholder perspectives (students, employers, admin, etc.) ○ Career services trends, etc. ○ Staff perspective (survey) 7. Setting priorities & formulating goals 8. Drafting of measurable objectives to support the goals 9. Discussion of over-arching Values 10. Review draft Mission and Vision |
| Day 3 | <ol style="list-style-type: none"> 11. Drafting of the Strategic Plan 12. Implementation <ul style="list-style-type: none"> ○ Developing individual objectives (1st year) ○ Performance Management Process |

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