

Strategic Planning Workbook

American Leadership Academy

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Building the Foundation for Your Plan

The Basics

- Where do we start?
- When go to a mall or campus and look at a directory, what is the most important landmark on the directory?

Evaluate where you are in your market

Campus Greek System							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
Rank							
Out of							
Faculty Perception of Us							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
Rank							
Out of							
Sorority Perception of Us							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
Rank							
Out of							
Community Perception of Us							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
High							
Low							
Alumni Perception of Us							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
High							
Low							
Parents Perception of Us							
	grades	intramurals	community service	social activities	philanthropy	leadership	chapter house
High							
Low							

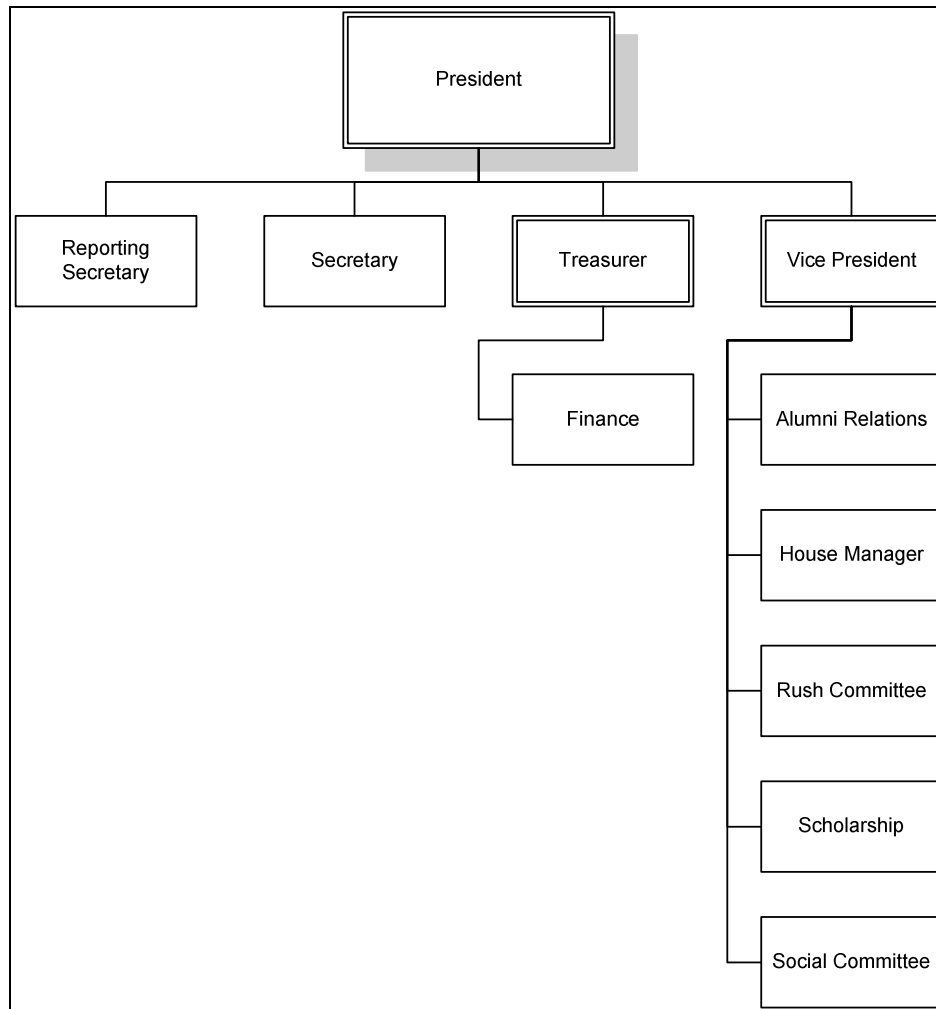
Be brutally honest when evaluating where you are – lying to yourself doesn't help anybody

Evaluate Your Organization

Do we have the right people on the bus?

Do we have the right people in the right seats on the bus?

Leadership Team



- Each box is a Leader and that leader has a role that takes specific skills, talents, and disciplines to be successful in the role
- Ask – “What qualities make the most successful Vice President...”
- Ask – “Is Joe the best person to be the Vice President, or would his gifts, talents, skills and disciplines be better utilized as _____?”
- $1 + 1 = 3$

Step 1: Objectives (Target)

Identify Your Objectives

Set Organizational Objectives from the top down ensuring that each individual leader maps their group's Objectives to the Leadership Objectives set by the Executive Team

- Objectives need to be specific, quantifiable and measurable with a timeline
- Only set 5 Objectives per group. This focuses the planning and effort put into achieving the objectives

Long Term: 5 Years

- Stretch your vision of where you see your organization 5 years from today in all areas
- BHAG – Big Hairy Audacious Goal

"Stakes in the Ground": 1 Year Increments

- Break your 5 Year objectives into milestones that you can measure along the journey
- Check your progress quarterly and make adjustments if necessary

Quarterly Objectives:

- Break your "Stake in the Ground" Objective into bite size pieces that you measure quarterly
- Check your progress mid-quarter and make adjustments if necessary

Example:

5 Year Leadership Objectives

- Grand Chapter of Phi Kappa Psi
- \$2M in Chapter Scholarship Fund
- 50% of Alumni are Involved w/ Chapter
- Top Fraternity on Campus (quality of members, academics, campus involvement, etc)
- Chapter is Debt Free

Once you have your Leadership Objective set – Get Granular

- What will it take for us to achieve each objective?
- What do we need to accomplish each year to build up to our 5 Year Objective?
- What will our organization need to look like to achieve each objective?
- What does each officer need to do to achieve each objective?
- What does each committee need to do to achieve each objective?
- What does each individual member/pledge need to do to achieve each objective?

Each Officer Position and Committee sets their Objectives to map to the Leadership Objective

Example:

Membership Committee Objectives

- 90% of Members live in for 4-years
- Members replace themselves 2X in their 4-years
- 10 Pledges per year from Incoming Freshman Scholarship Program
- Parents, Alumni and Peers refer 10 Pledges per year
- 30 man pledge class each year for 4 consecutive years

Step 2: Strategies (Bow)

Identify Your Strategies

These are strategic actions that will move you towards accomplishing the specific Objective. Each group will target 3 - 5 Strategies per Objective

What is a Strategy?

- A statement that describes the outcome of actions that drive you toward the accomplishment of your stated objective.
- It is measurable and can be reviewed & revised quarterly or annually as you gain an understanding of the effectiveness of the strategy.

Ideas for Developing Strategies:

- Brainstorm a list of ideas that will allow you to accomplish your stated objective
- Identify the top 3 – 5 strategies that you have the talent, skills and people to accomplish
- Think outside the box – don't constrain your ideas to your circumstances
- Think of ideas that you may need others to partner with you to accomplish – expand your influence
- Get excited about accomplishing the objective

Example:

Membership Committee Strategies

Objective: 10 Pledges per year from Incoming Freshman Scholarship Program

Strategies:

- Phi Kappa Psi scholarship promoted by University
- All high schools in Washington promote the scholarship to seniors
- All applicants and parents gain a positive image of Phi Kappa Psi
- Parents & Alumni recommend 30 incoming freshmen for the scholarship

Step 3: Tactics (Arrows)

Identify Your Tactics

Tactics are daily/weekly/monthly action items that combined will make up your strategy. Select 4 – 5 Tactics per Strategy. Tactics are measurable action items with start & end dates that tie to the accomplishment of your strategies.

Developing Tactics

Ask yourself – “what are the specific actions that we need to take to accomplish our strategy?”

Example:

Membership Committee Tactics

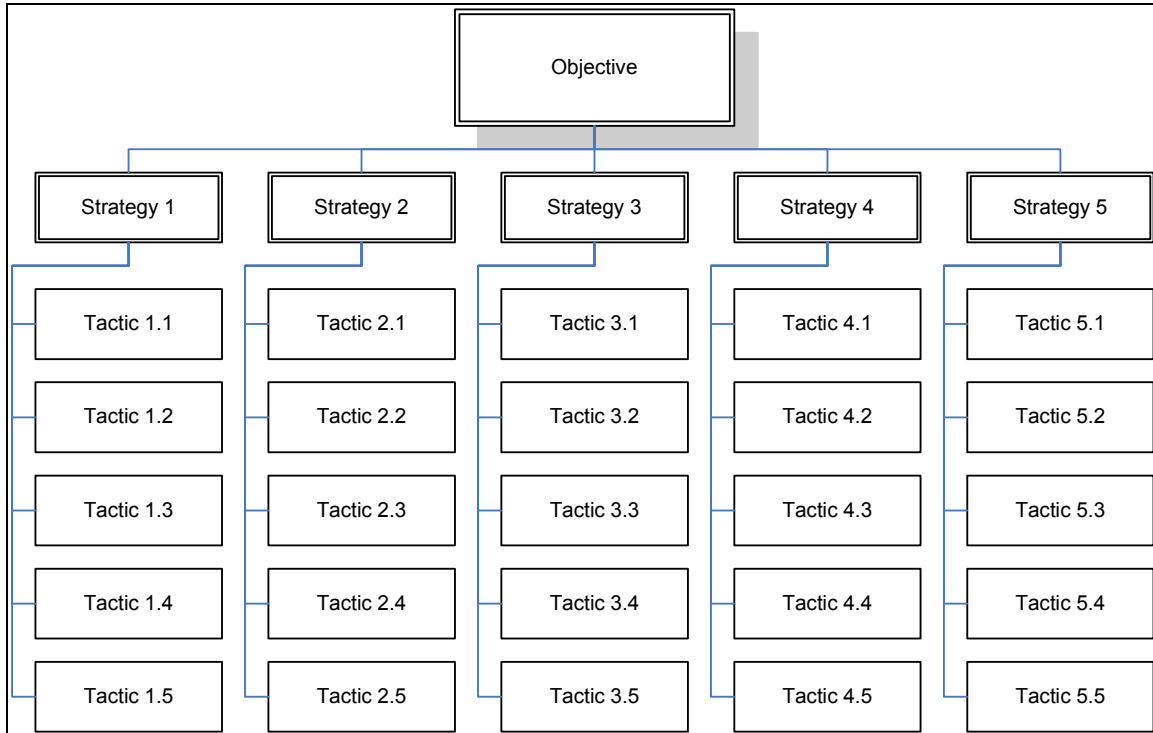
Objective: 10 Pledges per year from Incoming Freshman Scholarship Program

Strategies: Parents & Alumni recommend 30 incoming freshmen for the scholarship

Tactics:

- Scholarship chair & alumnus meet with each parent by 3/1/09
- Alumni at Founders Day get scholarship applications & explanation of program 2/19/09
- Parents are asked for names of 5 seniors that they know will attend UW
- Alumni are asked for names of 5 seniors that they know will attend UW
- Scholarship committee & alumnus plan to follow up with all referrals by 4/1/09

Objectives / Strategies / Tactics



Step 4: Implement the Plan

Once the leadership team has reviewed each leader's objectives and has validated that the objective maps to the overall leadership objective, it is time to implement the plan.

Communicate the Vision

The leader (president, vice president) presents the Leadership Objective (long term and mid term) to the organization. Each of the committee chairmen & officers reviews their objectives strategies & tactics with their individual teams and shows them how they each contribute to the success or failure to accomplish the Leadership Objective.

- Be consistent in communicating the vision – frequency & messaging

Put the Plan into Action

Weekly Not-to-Fails

- Each leader briefs the leadership team on 3 – 5 "not to fail" action items that they will accomplish that week.
- The following week each leader debriefs the leadership team on the success or failure of accomplishing the 3 – 5 "not to fail" action items, and briefs the team on the coming week's "not to fails".

Successes & Lessons Learned

- Tactics, Strategies & Objectives that work are "successes".
- Tactics, Strategies & Objectives that don't work are "lessons learned"
- Failure to accomplish a stated goal is only a failure if you do not learn from the failure and make the appropriate changes.

Review the Plan

- Weekly, monthly & quarterly check-ins on progress are essential.
- Quarterly and annual reviews of the objectives, strategies & tactics – with brutal honesty will keep your plan moving forward.
- Most organizations and individuals fail to review and adjust, and as a result, they do not accomplish their stated objectives & goals

Rate Your Success

- Apply a scale of importance to the objectives & strategies quarterly that you can measure as part of your review.
- Weigh the objectives & strategies on a sum total scale of 100%. Each objective & strategy is weighed based on the impact to the overall leadership objectives.
- Rate your level of accomplishment based on a scale of 1 to 5. 1 = 0% accomplished, 3 = 50% accomplished, 5 = accomplished 100%
- Be brutally honest in your evaluation and be open to feedback from your peers