Strategy Outside of a Plan

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Contact Institute staff member Karyn MacRae at 202-463-5704 with any tech help issues.
Strategy

I have a plan.
Strategy

A plan of action or policy designed to achieve a major or overall aim

cc: reallyboring - https://www.flickr.com/photos/26582481@N08
Life Strategic Plans

PROFESSIONAL

cc: JonoMueller - https://www.flickr.com/photos/45939540@N05
Life Strategic Plans

• Bring organizations master level facilitation, so they can in turn craft stronger visions and paths to achieving those visions, impacting their members, communities, society, and the world
Life Strategic Plans

Communal
Life Strategic Plans

• Be of service to friends, colleagues, and those in need - serving as a hub of connection, catalyzing new relationships for mutual benefit.

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Life Strategic Plans

Personal
Life Strategic Plans

• Be Abba before anything else in life
• Don't just speak to my children, but with them
• Give them room to learn and fail, but be safe
• Everyday, make sure they know how loved they are
Life Strategic Plans

Yours?

Yours?
Strategy Benefits

• Shared Vision, Mission
• Consensus definitions of success
• Targeted resource allocation/efforts
• Tool to communicate intended focus & impact
• Historical perspective & learning
Strategy Deficits

- Moment in time - these are times of change
- Authors cycle off w/out new ownership
- Voice of the member/community
- Process expertise is not a requirement
- Created for, rather than with
Strategic Plan

Components
History

Where You Came From
Vision

- Additive Listening
Org Vision/Mission

Why You Exist
Org Vision/Mission

• Leadership litmus test
• Resonance in affiliation
• Definition to the external
Org Vision/Mission

• Vision: Statement of the future because of your unique contribution
• Mission: How you will get there
**Identity**

Key Organization Definitions
**Identity**

- Profession or professional
- Experimentation & risk
- Diversity, Inclusivity, Equity, & Accessibility
- The place of money
Audiences

Know Your Who
Core Values

1. Deliver WOW Through Service
2. Embrace and Drive Change
3. Create Fun and a Little Weirdness
4. Be Adventurous, Creative, and Open-Minded
5. Pursue Growth and Learning
6. Build Open and Honest Relationships With Communication
7. Build a Positive Team and Family Spirit
8. Do More with Less
9. Be Passionate and Determined
10. Be Humble
Core Pillars

Areas of Focus
Core Pillars

• These are not programmatic areas

• These are the places where programmatic areas will advance the mission
Success Statements

Broad Statements of Advancement
Strategies

Paths to Achievement

cc: Elijah - https://www.flickr.com/photos/51035652915@N01
Unifying Vision

• What we have built can be a place of contribution, co-creation, and collaboration across the organization

Photos by Beau Considine

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Near Term Results

Milestones to Measure
Operational Plan

Action Items, Finance and Resource Allocation, etc.

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Strategic Plan

• History
• Mission/Vision
• Core Audiences/Values
• Pillars
• Success Statements
• Strategies
• Near Term Results
• Operational Plan
Strategy Outside the Plan

Daily Conversation
Plan Ahead Team

Moment of Shift
Plan Ahead Team

- Starting position
- Develop scenarios
- Posture/broad direction of travel
- Robust moves against scenarios
- Set trigger points
Listening as a Board Competency
Listening as a Board Competency

- 6 month member survey
- Monthly Calls
- Member site visits
- Partner Advisory Group
- Audience Advisory Groups
- Competition Awareness
- Event Survey/Focus Groups
Listening as a Board Competency

Master Listener

cc: Zach Dischner - https://www.flickr.com/photos/35557234@N07
Priority Input to Governance
Listening Start
Strategic Refresh

Vision in Disruption

cc. kenteegardin - https://www.flickr.com/photos/26373139@N08
Vision in Disruption

• Right People in the Room
Right People in the Room

• How you constitute your Board
• If you had no onus of title, who are the people that are skilled in foresight, that have a strong organizational foundation, that can focus on tomorrow?
Vision in Disruption

• Right People in the Room
• Confirm Vision/Mission
. Vision In Disruption

• Right People in the Room
• Vision/Mission Confirmation
• 12/6/3 efforts
Vision in Disruption

• 12 months from now, what do we want our members to say about our organization?
Core Audiences

Remembering your Who
Core Audiences

- Universal
- Core
- Needs
- Solutions
- What don't we know
Core Audiences

• Governance and staff systems to pursue knowledge
• Advisory groups for strategy input
• Measures
• Ongoing strategic input
Core Audiences Start
Program Impact Matrix

Sacred Cows - Buh-Bye
Program Impact Matrix

• All programs/products
• Services/experiences
• Fiscal/Mission Impact
Program Impact Matrix

- All programs/products
- Services/experiences
- Fiscal/Mission Impact
- Invest/Sunset Conversation
- Impact Awareness
Program Impact Start

cc: aditya - https://www.flickr.com/photos/75174448@N00
Creating Space for Innovation

- Voices of Innovation
- Focus need your are trying to meet
- Tolerance for risk & failure
- Curiosity and learning
- Resource commitment
- Evolutionary practices
Creating Space for Innovation

• Culture of Innovation - Experience Design?

• What is, What if, What wows, What works

• Tolerance for experimentation
Forced Innovation Lessons

• From our past year, what strengths have we found?
• If we were our own case study, what would we have done differently?
Innovation Start
Building Board Relationships

Building Board Relationships

- Relationship ebbs & flows
- Priority of relationship strength in partnership and communications

Building Board Relationships

- Calendar mapping relationships
- Key personal info
- Self assessed state of the relationship

Communication, Relationships, Community
Communication

- Town Halls
- Quality vs. quantity
- Personal, varied voices
Relationships

- Board connection with leaders
- Leadership connection with members
- Board relationship dashboard
Community

- Platforms of content
- Platforms of convening
- Platforms for community & relationships
Governance Alignment

Regular Cycle with Strategy

A Strategic Plan

Should Seed Strength & Unity

cc: Matt. Create. - https://www.flickr.com/photos/76583692@N00
Strategic Focus

Is Your Constant
Strategic Expertise

Nature vs. Nurture

cc: GollyGforce - Living My Worst Nightmare - https://www.flickr.com/photos/20581458@N00
Moment of Malleability

New Patterns & Practices
Space & Grace
Questions?
Questions?

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Thank you

cc: Auntie P · https://www.flickr.com/photos/32625013@N00