



2021 TO 2025 STRATEGIC PLAN

FROM VISION TO RESULTS

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PROCESS AT A GLANCE

A strategic plan serves as the roadmap in prioritizing objectives and initiatives, as well as looking at important metrics and key performance indicators (KPIs) to ensure they are on the path to success. The process of developing and implementing a strategy is just as important as the plan itself. Below is our process at a glance.



GETTING STARTED

Step	Action	Who is involved	Tools & Technique	Duration
1	Establish our strategic planning team and schedule	Council & CAO		1 week
2	Collect and review information to help make the upcoming strategic decisions	Planning Team		
3	Develop a stakeholder engagement plan	Planning Team		1 week
4	Obtain approval for proposed planning project	Council		

ASSESS

Step	Action	Who is involved	Tools & Technique	Duration
5	Identify Strategic Issues			
6	Conduct an environment scan	Planning Team	Environmental Scan Worksheet	1 week
7	Identify opportunities & threats			
8	Identify strengths & weaknesses			
9	Develop SWOT		SWOT Worksheet	
10	Gather stakeholder input	Planning Team, All Staff, and the Public	Surveys, meetings, presentations, etc.	2 weeks

DESIGN

Step	Action	Who is involved	Tools & Technique	Duration
11	Develop mission statement		Mission Statement Worksheet	
12	Identify corporate values	Planning Team	Vision Guide and Worksheet	1 week
13	Create vision statement			

BUILD

Step	Action	Who is involved	Tools & Technique	Duration
14	Use our SWOT to set priorities			
15	Define long-term objectives	Planning Team		1 week
16	Set organization-wide goals and measures			
17	Select key performance indicators (KPIs)			
18	Cascade strategies to operations			
19	Gather stakeholder input	Planning Team, All Staff, and the General Public	Surveys, meetings, presentations, etc.	2 weeks

MANAGE

Step	Action	Who is involved	Tools & Technique	Duration
20	Establish implementation schedule	Planning Team		1 week
21	Rollout strategy to organization and public	Planning Team		1 week
22	Track goals & actions			
23	Adapt quarterly & update annually	Council & CAO		∞

INTRODUCTION

Do we wonder where our Municipality will be in five years? Ten years? Fifty years?

Are we equipped to operate successfully in the future?

How will we be affected by:

- environmental trends?
- reduced resources?
- new demands of residents?

These are important questions to consider and a strategic plan can help us answer them.

Strategic planning is the process by which an organization determines its long-term goals and the actions needed to reach them. It is a useful process that blends high level visioning and objective analysis of goals and priorities to chart a future course of action in the face of competing priorities. The success of any strategic plan comes from its successful implementation. It is critical for organizations to link their strategic planning efforts to other critical decision-making processes, and to ensure to support priorities and to guide trade-offs among competing demands for time and resources.

For municipalities, the strategic plan is a keystone document. It guides it towards where it would like to be in the future (proactive) versus having to deal with situations as they happen (reactive) and includes the steps it will take to get there.

It also involves stakeholders (Council, Staff, General Public, Businesses, Neighbouring Units) in visioning the preferred future which helps produce a flexible plan derived from internal discussions and external sources of input.

Strategic planning **is not** a one-shot deal, a box of tricks, a bundle of techniques, a quick fix to solve immediate problems or a report left to sit on a shelf.

OUR PROCESS

The strategic planning process is about getting from Point A to Point B more effectively, efficiently, enjoying the journey and learning from it. Part of that journey is the strategy and part of it is execution. Having a good strategy dictates “how” to travel the road selected, and effective execution makes sure to check-in along the way. On average, the process can take between three and four months, but this varies as no one organization is alike.

The process we will use has 4 phases: Assess, Design, Build and Manage. Each phase has detailed action items which includes responsibility, tools, and duration.

The **Assess** phase will allow us to gather insights and conduct a SWOT to determine our strategic position. The **Design** phase will then give us the opportunity to develop our mission, vision, values, and core competencies. We will then move onto the **Build** phase which will see the planning team build a plan that we can actually implement. Finally, the **Manage** phase will determine how we will execute our strategy and manage its performance.

These phases will be overseen by the planning team which will include key individuals and decision makers. Their work will be conducted in a combination of formal meetings, workshops, engagement sessions and on-on-one conversations.

Below is an illustration that further details our process.

Our Strategy Management Process

Getting started: ✓ Planning team ✓ Create schedule ✓ Gather documents



GETTING STARTED

DURATION: 3 WEEKS

To get started on the right foot, there are five key steps that must be completed.

Step 1 - Establish the planning team

It is important to choose someone to oversee the development and implementation and some of the key individuals and decision makers for this team. It is recommended that the team should be a small group of approximately 12-15 persons.

In our case, the CAO will act as the “Chief Strategy Officer” and the following individuals will be members of the team:

- All five (5) members of Council
- Director of Property Services
- Director of Recreation
- Director of Finance
- Municipal Clerk
- Director of Marketing and Tourism Promotion
- Building Inspector/Development Officer

Step 2 - Create a schedule

Timelines are essential to any project. They are not only helpful in organizing the work that needs to be done, but it holds everyone accountable for completing the work. In addition to keeping the project on track, they encompass what the project will accomplish and help to set clear direction and priorities.

The importance of creating a schedule is essential to a concise and productive strategic planning process. In this case, the process is intended to take 16 weeks and each milestone will be detailed and monitored regularly by the planning team.

Step 3 - Collect and review information

Collecting and reviewing information is crucial to understanding where we are. The following information will be collected and reviewed:

- The last strategic plan
- Mission statement, vision statement, values statement
- Integrated Communities Sustainability Plan (ICSP)
- Fire Service Study
- Municipal Climate Change Adaptation Plan (MCCAP)
- One Nova Scotia Plan
- Physician Recruitment Plans
- Past Recommendations
- Recreation Master Plan
- Provincial Recreation Plans

- Municipal Planning Strategy (MPS) and Land-Use By-Law (LUB)
- Business Park Study
- Hotel Study
- Financial records for the last few years

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Step 4 - Develop a stakeholder engagement plan

A stakeholder engagement plan—also known as a stakeholder management plan—is a subsidiary document that is often created alongside the main project plan for a given body of work. It is a written document that is formulated before a project begins, and which is kept on file and updated over the course of the project, as necessary. Its purpose is to identify a project’s key stakeholders, and to outline a methodology and approach for how the project team will interact and communicate with those stakeholders.

A stakeholder engagement plan typically has three sections: stakeholder identification, how we will interact with stakeholders and engagement activities.

This stakeholder identification section is used to identify all of the project’s stakeholders by name. At a minimum, the section also defines their roles and responsibilities as they relate to the project, but in some cases, it can be much more extensive.

The section detailing how we will interact with stakeholders is dedicated to actually determining how the project team will interact and engage with the stakeholders identified in the first portion of the plan. This will often involve a deeper assessment of each stakeholder, which will be used to inform the rest of the plan.

The final portion of the plan is essentially an outline of the various activities the project team will undertake to communicate with stakeholders, manage their expectations, and keep them engaged with the project. This includes activities such as pre-planned meetings with stakeholders or key reports. This section of the document will also typically outline the types of communications that will be used throughout the project—including email, periodic meetings, conference calls etc.—and who each form of communication is best suited for.

The stakeholder engagement plan will be the foundation for achieving buy-in from our residents. It will be important for the planning team to keep an up-to-date version on file and update it over the course of the process, as necessary.

Step 5 - Obtain approval for proposed planning project

As with any process related to policy or strategy, the direction is provided by Council. The strategic planning process is no different and the process will be reviewed and approved by Council, As per normal procedure.

ASSESS

DURATION: 4 WEEKS

As mentioned, a strategic plan is an organization's roadmap or trip plan. Where it is headed is the vision and why they are going is the mission. The strategy is the road they select to travel. The scenery and landscape is the industry or market they are operating in. The type of 'bus' they drive is the operations. How it feels on the 'bus' is the organization's culture, teamwork, leadership, and climate for action. Who is on the 'bus' are the employees and lastly, the time and money they use to get to the destination, the direct route or with detours, dictates the efficiency. For now, we will focus on the 'scenery' and the 'bus'.

Before we jump in, we must determine as a team how wide and how deep we want to go with collecting and analyzing information. A good rule of thumb is this: we need the right information and data, not too much or too little, to feel confident in making strategic choices and decisions. The methods to collect that information include web research, market, and industry trends, sending out surveys, and acquiring information from our neighbours and other levels of government.

Step 1 – Strategic Issues

Strategic issues will be developed and identified based on input from the planning team. These issues should be a summary of critical topics that need to be addressed during the planning process. The idea is to call these issues out early so we ensure the important areas are not lost as we dive into a lot of data, detail, and ideas.

Step 2 – Conduct an Environmental Scan

Next, we must conduct an environmental scan to understand our environment. An environmental scan is also referred to as a PEST analysis, which is an acronym for Political, Economic, Social and Technological trends. All of these trends play a part in determining the overall environment. Some examples of topics include the following:

Political: elections, environmental regulations, municipal regulations, regional relationships/attitudes, political trends, governmental leadership.

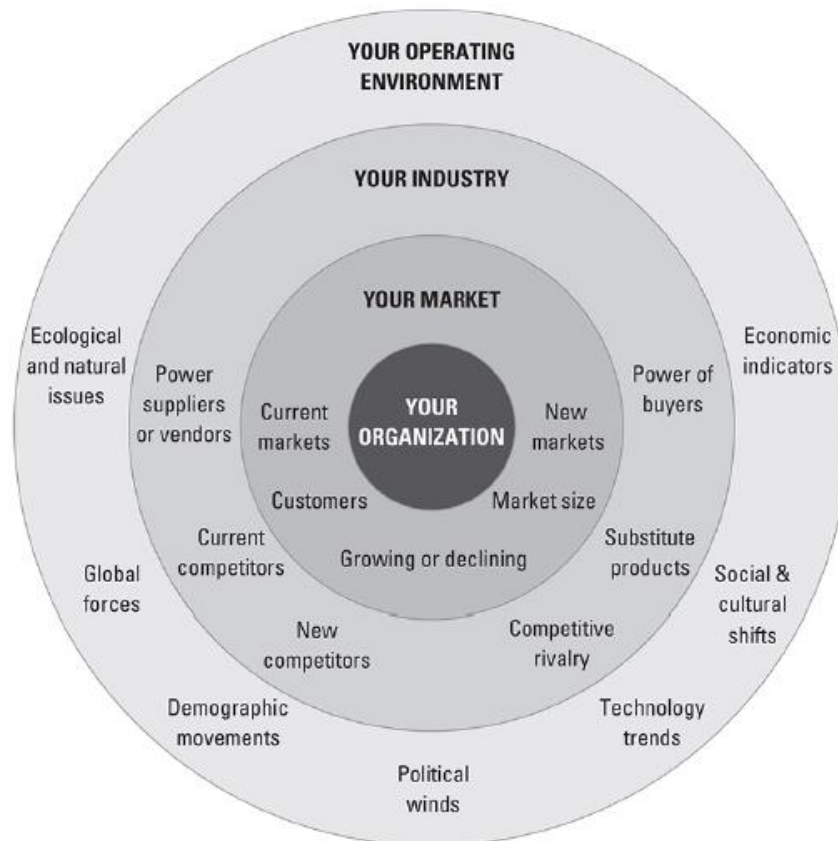
Economic: economic growth trends, assessment trends, funding opportunities, job growth/unemployment.

Social: demographics (age, gender, race, family size, etc.), population shifts, education, diversity, immigration/emigration, health, living standards and leisure activities.

Technological: inventions, new discoveries, research, energy uses/sources/fuels, communications, information technology, transportation, and waste removal/recycling.

After the key trends have been identified, the next step is to analyze the potential each trend has to disrupt the way we do business. We will then be able to determine the changes needed to exploit the opportunities and mitigate the threats.

Our operating environment is influenced by several general areas. These areas summarize the external environment every organization operates in and are illustrated in the diagram below:



Step 3 – Identify Opportunities & Threats

Opportunities are situations that exist but must be acted on to benefit from them. Opportunities most relevant to an organization are those that offer important avenues for growth, those where an organization has the most potential for competitive development, and those that match up

well with the financial and organizational resource capabilities that the organization already possesses or can acquire.

Threats refer to external conditions or barriers that may prevent an organization from reaching its objectives.

Step 4 – Identify Strengths and Weaknesses

Strengths refer to what an organization does well. It gives it an advantage in meeting the needs of its target markets. An analysis of organization strengths should be market and resident-focused because strengths are only meaningful when they assist the business in meeting resident needs. Strengths give the organization enhanced competitiveness.

Weaknesses refer to any limitations an organization faces in developing or implementing a strategy. A weakness is something an organization lacks or does poorly in comparison to others, or a condition that puts it at a disadvantage. Weaknesses should also be examined from a resident perspective because residents often perceive weaknesses that an organization cannot see.

	INTERNAL		EXTERNAL
STRENGTHS	Capabilities Resources Processes	OPPORTUNITIES	Operating Environment Industry Market
WEAKNESSES	Other process areas Current Customers	THREATS	Competitors

Step 5 – Develop SWOT

A SWOT analysis is a quick way of examining an organization by looking at the internal strengths and weaknesses in relation to the external opportunities and threats. By creating a SWOT analysis, we can see all the important factors affecting our organization together in one place. It is easy to read, easy to communicate, and easy to create.

Below are a series of questions that will help we analyze the internal strengths and weaknesses of our organization and the external opportunities and threats impacting on our organization.

Some questions to ask while preparing our SWOT:

- **Strengths:** What is golden about our company? What do we do well (in sales, marketing, operations, management)? What are our assets? What are our core competencies?
- **Weaknesses:** What do we need (resident service, marketing, accounting, planning)? Where do we lack resources? What can we do better? Where are we losing money? What necessary expertise/manpower do we currently lack? In what areas do our competitors have an edge?
- **Opportunities:** Where is the blue sky in our environment? What new needs of residents could we meet? What are the economic trends that benefit we? What are the emerging political and social opportunities? What are the technological breakthroughs?
- **Threats:** Where are the red alerts in our environment? What are the negative economic trends? What are the negative political and social trends? Where are we vulnerable?

Once we have completed our SWOT, we should use the information to start developing a strategy that will leverage our organization's strengths to pursue opportunities, while also countering identified weaknesses and threats that might undermine our efforts. Most importantly, we can match our strengths with opportunities, shore up our weaknesses, and combat our threats as a starting point to form our goals.

DESIGN

DURATION: 2 WEEKS

Knowing why we are doing what we are doing (our mission), where we are trying to go (our vision), and how we are going to go about it (our values) are the glue that holds an organization together. It is an essential part to building our strategic foundation and developing a strategy. We preserve these elements while our strategies and goals change and flex with the environment. We may modify our mission, vision, or values over time, but the intent stays unchanged and we will have complete clarity when making critical business decisions that impact our future.

Missions, Visions and Values can sound abstract, esoteric, and downright fluffy to a lot of people, especially those who are burning to move forward with a real-world project. These people do not want to hang back conceptualizing about people's wishes and dreams. Being pragmatic should not get in the way of this important stage of building a strong foundation of consensus. If we do not take the time to articulate mission, values, and vision on the front end as we develop a strategy, we will pay for it later when writing goals and objectives without a crystal-clear strategic direction.

To efficiently move through this phase, it is important to understand the difference between mission and vision. Mission is a statement about an organization's core purpose, why they exist, and is best stated in the present tense. Vision is a statement about an organization's desired state, where it wants to go, and is best stated in the future tense. While we might find values interspersed throughout both our mission and vision, an effective values statement clearly delineates the guiding principles of the Municipality. Because these three statements are foundational to an effective strategic plan, it is important take the time to get them right. However, we should not get stuck on wordsmithing, but rather focus on intent and allow them to be drafts until everyone is comfortable stamping them final.

Step 1 - Develop mission statement

This part of our strategy development is the core purpose, the underlying "why" we are climbing the mountain. A mission statement is a declaration of an organization's purpose and spotlights the business they are presently in and the resident/constituent needs they are presently endeavoring to meet. To build a solid foundation for a successful organization, it is essential to

have a written, clear, concise, and consistent mission statement that simply explains who we are and why we exist. Keep it short – our mission should fit on a t-shirt.

A mission statement should serve as a guide for day-to-day operations and as the foundation for future decision-making. These guidelines will be helpful when writing or evaluating ours:

- **Focus on satisfying resident/constituent needs:** A mission statement should focus an organization on satisfying resident/constituent needs rather than on a program or service. It tells “who” our resident/constituents are, “what” needs we wish to satisfy and “how” these needs will be satisfied.
- **Based on our core competencies:** We should base our mission on a competitively superior internal strength, unique capability, or resource that the organization performs well in comparison to similar organizations.
- **Motivate and inspire stakeholder commitment:** A mission statement should be motivating. Our stakeholders need to feel that their work is significant and that it contributes to people’s lives.
- **Realistic:** A mission statement should be realistic. We should avoid making the mission too narrow or too broad. Specific, short, sharply focused, and memorable: It should be a precise statement of purpose that describes our essence of in words our constituents and stakeholders can remember us by. It should “fit on a T-shirt.”
- **Clear and easily understood:** Develop and write a mission statement on a “party level” (i.e., simple, and clearly) so that it can quickly and briefly tell people at a party or on airplanes why an organization exists. At the same time, it needs to give the organization a profoundly simple focus for everything it does.

Step 2 - Identify corporate values

Values are enduring, passionate, and distinctive core beliefs, and they are an essential part of developing our strategy. They are based on enduring tenets—guiding principles—to adhere to no matter what mountain we climb. Our core values are part of our strategic foundation. They are the beliefs that guide the conduct, activities, and goals of our organization. They establish why we do what we do and what we stand for.

Values are deeply held convictions, priorities, and underlying assumptions that influence the attitudes and behaviors of our organization. Strong values account for why some organizations gain a reputation for such strategic traits as leadership, product innovation, and total resident satisfaction.

An organization's values can dominate the kind of strategic moves it considers or rejects. When values and beliefs are deeply ingrained and widely shared by directors, managers, and staff, they become a way of life within the organization, and they mold organizational strategy.

Here are some guidelines in developing core values:

- **Keep the list of values to between five and seven.** They need to be memorable to our staff.
- **Create phrases, but not paragraphs.** One word is not enough to convey real meaning of a value.
- **Make the values specific, not generic.** It takes more than one word to define specificity.
- **Values need to be shared.** While we do not need consensus from everyone in our organization, we do need agreement from senior leadership.
- **If it is already stated in the mission, do not repeat it.** Some values-driven language may be part of our mission statement. That is fine but consider not repeating what we have covered elsewhere.

Step 3 – Create vision statement

The vision statement reflects the specific mountain we are currently trying to climb – the “where.” A vision is a picture of what an organization's future makeup will be and where it is headed. Vision provides a clear mental picture of what an organization will look like in 5 to 10 years from now. Forming a strategic vision should provide long-term direction, delineate the organizational activities to be pursued and the capabilities the organization plans to develop, and infuse the organization with a sense of purposeful action. It serves as a unifying focal point for everyone in the organization like a North Star. It delineates the future focus and where the organization is going.

An effective vision statement consists of the following elements. Our vision statement may or may not incorporate all of these elements, but we will keep them in mind when writing or evaluating ours.

The following areas can help us identify opportunities and threats that can be collected via research and surveys.

- **Futurecasting:** Provides a picture of what we will look like in the future.

- **Audacious:** Represents a dream that is beyond what we think is possible. It represents the mountaintop we are striving to reach. Visioning takes us out beyond our present reality.
- **Motivating:** Clarifies the direction in which we need to move and keeps everyone pushing forward to reach it.
- **Purpose-Driven:** Worded to give everyone a larger sense of purpose – so we see ourselves as “building a cathedral” rather than “laying stones.”
- **Inspiring:** Worded in engaging language that inspires and engages people. It creates a vivid image in people’s heads that provokes emotion and excitement. It creates enthusiasm and poses a challenge that inspires and engages people.
- **Capitalizes on Core Competencies:** Built on our core competencies. It builds on what we have already established – history, resident/constituent base, strengths, and unique capabilities, resources, and assets.

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BUILD

DURATION: 3 WEEKS

Now that we have addressed where we are and where we are going. Now, we will focus on how we will get there. We will use our SWOT to stay grounded and realistic as we build a roadmap from where we are today to where we want to be. As we develop our strategy and set our goals, make strategic choices about what to do and not to do. Remember that being strategic is about making those hard choices. A mark of a good strategic plan is one that is clear and focused (not too many goals and objectives), as well as balanced – telling a strategy story about how we are linked and aligned to drive key performance indicators.

We will spend some time uncovering our competitive advantages based on an understanding of our strategic position. Our competitive advantages are the essence of our strategic plan because strategy is about being different. It is deliberately choosing to perform activities differently or to perform different activities than competitors to deliver value to our residents.

To eliminate any confusion around semantics by using these definitions:

- **Strategies:** The route we intend to take and the general methods we intend to use to reach the top of that specific mountain.
- **Long-Term Strategic Objectives/Priorities:** Intermediate objectives to the top of the mountain. If we have a 5-year vision, these would be 3- to 4-year intermediate objectives on the way up the mountain.
- **Short-Term Goals and Actions:** Specific moves for climbing the sections of rock and ice that confront us right now. These would be analogous to detailed annual plans for getting things done this year on the way to the 3-year objective.

Step 1 - Use our SWOT to set priorities

The SWOT analysis will help us get a better understanding of the strategic alternatives and choices that we face.

The TOWS Strategic Alternatives Matrix to help we think about the options that we could pursue. To do this, match external opportunities and threats with our internal strengths and weaknesses, as illustrated in the matrix below:

TOWS Strategic Alternatives Matrix:

	External Opportunities (O)	External Threats (T)
Internal Strength (S)	SO Advantage Strategies: Strategies that use strengths to maximize opportunities.	ST Protective Strategies: Strategies that use strengths to minimize threats.
Internal Weakness (W)	WO Conversion Strategies: Strategies that minimize weaknesses by taking advantage of opportunities	WT Defensive Strategies: Strategies that minimize weaknesses and avoid threats.

We will then evaluate the options we have generated, and identify the ones that give the greatest benefit, and that best achieve our mission and vision.

Step 2 - Define long-term objectives

Using the information gathered in our SWOT analysis, we will develop at least one object, but not more than five to seven, for each of the following areas develop.

- The “**Financial**” perspective indicates whether our strategy, implementation, and execution are contributing to top and bottom-line improvement include the following: Cash flow, Sales growth, ROE, etc.
- The “**Resident**” perspective is focused primarily on creating value and differentiation when acquiring, retaining, or servicing the resident. This driver deals primarily with setting expectations and service levels.
- Focusing on “**Internal Processes**” in operations has the greatest impact on resident satisfaction. Positive long-term results rely on defining the competencies needed to maintain and maximize the effectiveness of those internal systems.
- The “**People/Learning**” perspective relies on an organization’s commitment to its greatest resource — people. This area focuses on creating value by developing an environment that fosters learning, innovation, and prioritizing on its “human asset.” The premise is that people drive the other three elements to achieve the organization’s goals.

Strategic objectives established should connect our mission to our vision. These objectives are long-term (think 3-5 years), continuous strategic areas that get us moving from our mission to achieving our vision. We will ask ourselves what the key activities are that we need to perform in order to achieve our vision.

Step 3 - Set organization-wide goals and measures

Once we have formulated our strategic objectives, we will translate them into goals and measures that can be clearly communicated to our planning team (team leaders and/or team members). We want to set goals that convert the strategic objectives into specific performance targets. Effective goals clearly state what, when, how, and who, and they are specifically measurable. They should address what we need to do in the short-term (think 1-3 years) to achieve our strategic objectives.

Remember this simple acronym to guarantee our goals are:

- **Specific:** Goals need to be specific. Try to answer the questions of How much and What kind with each goal we write.
- **Measurable:** Goals must be stated in quantifiable terms, or they are only good intentions. Measurable goals facilitate management planning, implementation, and control. For example, a measure might be “# of new residents” or “% complete” and a target might be “500” or “100%”, respectively.
- **Attainable:** While goals must provide a stretch that inspires people to aim higher, they must also be achievable, or they are a set-up for failure. Set goals we know we, our organization, and our employees can realistically reach.
- **Responsible person:** Goals must be assigned to a person or a department. But just because a person is assigned a goal does not mean that they are solely responsible for its achievement; they just need to be the point person who will ensure the goal is achieved.
- **Time specific:** With reference to time, our goals must include a timeline of when they should be accomplished.

Step 4 - Select key performance indicators (KPIs)

To help monitor our strategic plan, one of the best tools around is the Balanced Scorecard, developed by Kaplan and Norton from Harvard. The scorecard is to be used as both a measurement and management tool to assist in fulfilling our vision. With it, we can actively track progress toward our goals. We will begin by asking “What are the key performance measures we need to track in order to monitor if we are achieving our goals?” These KPIs include the key goals that we want to measure that will have the most impact in moving our organization forward.

The scorecard has four categories of measures:

1. **Financial/Mission** — How do we look? These measures indicate whether our strategy, implementation, and execution are contributing to bottom line and top line improvement.
2. **Resident/Constituent** — How do we provide value? These measures are customized to each of the targeted groups we serve.
3. **Internal/Operational** — Which processes must we excel at? These measures focus on internal programs and activities that have an impact on resident/constituent satisfaction. They focus on internal processes needed to sustain our competitive advantage.
4. **People/Learning** — To excel at our processes, how must we learn and improve? These measures identify the infrastructure that we must build to create long-term growth and improvement. It includes our ability to attract essential staff, innovate, improve, and learn.

Step 5 - Cascade strategies to operations

By the time we get to cascading our strategy, we may be tired and worn out from all of the work leading up to this point. But we cannot stop yet! Cascading action items and to-dos for each short-term goal is where the rubber meets the road – literally. Moving from big ideas to action happens when strategy is translated from the organizational level to the individual.

Here we widen the circle of the people who are involved in the planning as functional area managers and individual contributors develop their short-term goals and actions to support the organizational direction. But before we take that action, determine if we are going to develop a set of plans that cascade directly from the strategic plan, or instead if we have existing operational plans that should be synced up with organizational goals. A pitfall is to develop multiple sets of goals and actions for directors and staff to manage. Fundamentally, at this point we have moved from planning the strategy to planning the operations, from strategic planning to annual planning. That said, the only way strategy gets executed is to align resources and actions from the bottom to the top to drive our vision.

Now in our Departments/Teams, we need to create goals to support the organization-wide goals. These goals should still be SMART and are generally (short-term) something to be done in the next 12-18 months.

Finally, we should develop an action plan for each goal. We will keep the acronym SMART in mind again when setting action items, and make sure they include start and end dates and have someone assigned their responsibility. Since these action items support our previously

established goals, we will consider action items our immediate plans on the way to achieving our (short-term) goals. In other words, we will identify all the actions that need to occur in the next 90 days and continue this same process every 90 days until the goal is achieved.

All the strategic objectives cascade down to the team member action items. For example, in the image below, strategic objective 1 cascades down to organization-wide goal 1.1, then department goal 1.1.1, then team member goal 1.1.1.1, which is supported finally by the team member action item 1.1.1.1.1.

Examples of Cascading Goals:

1 Develop additional commercial/business property.

1.1 Develop a minimum of one new business park with over 12 properties. (Within 3 years)

1.1.1 Prepare a preliminary design for the best location for a new business park. (Economic Development, due in 12 months)

1.1.1.1 Determine the best location for a new business park. (Chris) (Economic Development, due in 6 months)

1.1.1.1.1 Complete a review of our current properties and highlight those that would be suitable and attractive for development. (Chris) (Economic Development, due in 3 months)

1.1.1.1.2 Complete a feasibility study of our current and prospective properties. (Chris) (Economic Development, due in 3 months)

MANAGE

DURATION: 4 WEEKS

Executing our strategic plan is as important, or even more important, than our strategy itself. Critical actions move a strategic plan from a document that sits on the shelf to actions that drive organizational growth. The sad reality is that the majority of organizations who have strategic plans fail to implement. Do not be part of the majority! In fact, research has shown that 70% of organizations that have a formal execution process out-perform their peers. (Kaplan & Norton)

Guiding our work in this stage of the planning process is a schedule for the next 12 months that spells out when the strategy reviews are, who is involved, what participants need to bring to the meetings and how we will adapt the plan based on the outcomes of the reviews.

We remain in this phase of the strategic management process until we embark on the next formal planning sessions where we start back at the beginning.

Remember that successful execution of our plan relies on appointing a strategy director, training our team to use any planning tool, effectively driving accountability, and gaining organizational commitment to the process.

Step 1 – Establish implementation schedule

Implementation is the process that turns strategies and plans into actions in order to accomplish strategic objectives and goals. Whereas the strategic plan addresses the what and why of activities, implementation addresses the who, where, when, and how. Below is a sample planning calendar that can help aid we in executing and rolling out our plan successfully. Once our resources are in place, we can set our implementation schedule.

Quarterly Schedule

Quarterly Actions



Monthly Schedule

Monthly Actions



Ideas for successful implementation:

- Communicate the strategy to everyone in our organization.
- Involve staff in the development of the plan.
- Assign staff clear goals that tap into their strengths.
- Have staff create the action items to support their assigned goals.
- Hold staff responsible for the achievement of assigned goals.
- Hold staff strategy meeting to report on the progress.
- If something in the plan is not working, change it. Take corrective action or move to build on success.
- Plan meetings where we only discuss strategy.
- Link strategy to performance.
- Make true self-assessment an ongoing practice.
- Celebrate when goals are reached.

Step 2 - Track goals & actions

Strategy meetings do not need to take a lot of time – 30 to 60 minutes should suffice. But it is important that key team members report on their progress toward the goals they are responsible for – including reporting on metrics in the scorecard they have been assigned. By using the measurements already established, it is easy to make course corrections if necessary. Key Performance Indicators (KPIs) should be reviewed during these regular meetings.

Our Bi-Annual Checklist

Strategic plans are guidelines, not rules. Every six months or so, we should evaluate our strategy execution and plan implementation by asking these key questions:

- Will our goals be achieved within the time frame of the plan? If not, why?
- Should the deadlines be modified? (Before we modify deadlines, figure out why we are behind schedule.)
- Should our goals be changed? (Be careful about making these changes – know why efforts are not achieving the goals before changing the goals.)
- What can be gathered from an adaptation to improve future planning activities?

Why Track Our Goals?

- **Ownership:** Having a stake and responsibility in the plan makes we feel part of it and leads us to drive our goals forward.

- **Culture:** Successful plans tie tracking and updating goals into organizational culture.
- **Implementation:** If we do not review and update our goals, they are just good intentions
- **Accountability:** Accountability and high visibility help drive change. This means that each measure, objective, data source and initiative must have an owner.
- **Empowerment:** Changing goals from In Progress to Complete just feels good!

Step 3 – Adapt quarterly and update annually

Restricting the meeting to reporting on measurements can help us stay on task and keep the meeting short. The meeting agenda should also include some time devoted to working on one specific topic or on one of the quarter’s priorities where decisions need to be made.

Holding meetings will help focus our goals on accomplishing top priorities and accelerating growth. Although the meeting structure is relatively simple, it does require a high degree of discipline.

Below is a sample strategy review agenda.

STRATEGY REVIEW AGENDA	
Kickoff and meeting setup	15 Mins
Corporate performance review	30 Mins
Department performance review (10 mins per department)	10 Mins per group
Strategic theme or topic (1 or 2 topics)	30 Mins per topic
Wrap up	5 Mins

Holding regular strategy reviews is the key to implementing our strategic plan, making the numbers, achieving our goals, and, finally, making strategy a habit for everyone involved. These meetings will give us the ability to manage activities that drive future results and hold people accountable for making sure those activities happen.

Regular strategy meetings will allow us to keep our finger on the pulse of our strategic planning efforts and make any necessary adjustments before it becomes too late.

CONCLUSION

A strategic plan needs to be adaptive to survive changing or unanticipated conditions. An organization that develops and executes a strategic plan gains significantly from the experience and starting with a working model and then building a tangible plan can be more successful for the organization than having no plan at all.

Over the life of our strategic plan, we may discover that some of the underlying assumptions of our strategy are flawed or incomplete. Often our organization's mission and vision may remain the same while our objectives and goals will need to be revised or updated.

Some organizations can maintain a strategic plan for a year or longer, while others have to respond to market changes more frequently. We must be prepared to let go and switch strategies, as necessary. Corrective action needs to be taken quickly to compensate for the dynamic environment we operate within.

DRAFT

