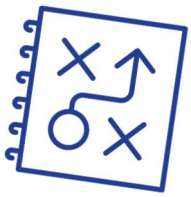
DEVELOP A STRATEGY FOR IMPACT

WHY STRATEGIES FAIL



Strategic plans fail or get shelved for many reasons.

- Organizations set too many goals. Teams lack focus on the few priorities that matter most. Effort is spread too thin and little progress gets made on any goals.
- Objectives lack specificity on the finish line or how to get there.
- Goal ownership is unclear, leading to a lack of accountability.
- Leaders set goals without engaging other stakeholders. The resulting plan lacks relevance and/or buy-in.
- Goals fail to cascade to managers and employees. Staff remain unaware of how they can contribute.
- Plans are not adequately communicated. No behaviors change or actions occur toward goal achievement.
- Strategy actions to support progress on the plan are not discussed and/or monitored. Inaction follows.
- Goal progress is not regularly reported and/or reviewed. Energy shifts toward more visible priorities.

STRATEGY DESIGN & EXECUTION

On Mission's *Strategy Design & Execution* approach brings leaders through a process of understanding internal and external dynamics to discern what to focus on in the years ahead. The process is rooted in prayer and an understanding the organization's capital M "Mission" for spiritual impact. This approach goes beyond goal setting alone to include strategy execution and management.

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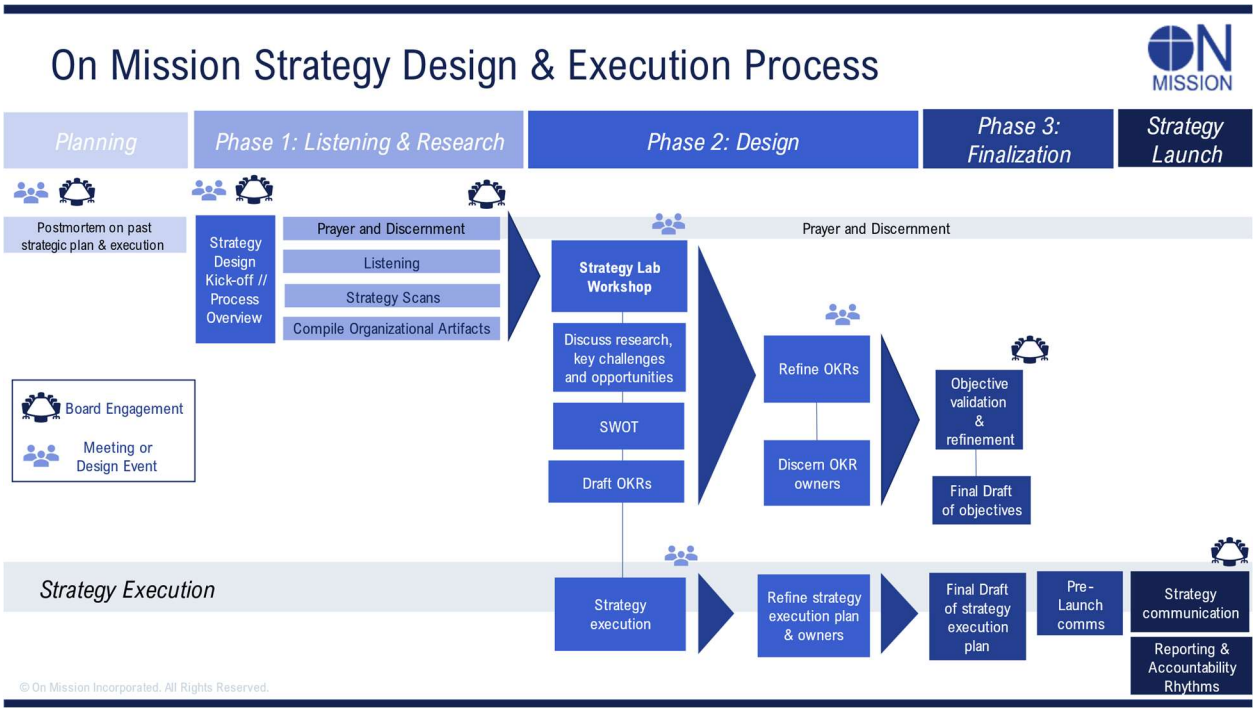

On Mission's *Strategy Design & Execution* process is adapted for the Client's timeframe and parameters. Each step ensures that the strategy developed avoids the common strategic planning pitfalls. The strategic objectives identified, as well as the plan for strategy execution, are designed with the Client to ensure buy-in. In each phase of the process, On Mission performs the following activities with the Client organization.

Planning

1. Work with the Client to **discern the timing, scope, and stakeholders** to be engaged in the process. This includes:
    a. Discerning the scope of listening activities (interviews and surveys)
    b. Selecting the strategy design team who will be directly involved in brainstorming and developing the strategic plan
    c. Determining the level and timing of board engagement throughout the process
    d. Selecting the topics ("strategy scan areas") that the Client's team will research.
    e. Selecting who will support strategy execution activities including coordinating prayer for the strategic planning process, communication of the plan, and plan reporting.
2. As requested, On Mission performs a **post-mortem analysis** of the previous strategic plan to glean lessons learned to inform the content and execution of the next plan. *Optional*.
3. On Mission provides an **information request list** for the Client to compile and share back.

Phase 1: Listening & Research

1. Collects, reviews, and **curates organizational information** provided by the Client. This information is used to understand and articulate why the organization was founded with special attention to its Christ-centered Mission.
2. As requested, **conducts interviews and surveys** of stakeholders including board, leaders, and staff to discern current state of Mission awareness and alignment. Surveys may be customized by the Client to include related areas of interest (e.g., staff engagement, alignment with specific core values, etc.). *Optional.*

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3. Coaches the Client's staff to **organize prayer around the strategy**.
4. Coaches the Client's staff to **compile strategy scans** to ensure the current internal and external dynamics are well understood by those engaging in the strategy design process. Scan areas typically include:
    a. Overview of human resources/people (Retention, attrition, staff health/engagement, etc.)
    b. Overview of the organization's programs (program-related KPIs, inputs, outputs, outcomes and impact data, as available)
    c. Overview of the funding (sources, concentration, trends over time, etc.)
    d. External environmental scans of relevant areas based on the organization's Mission, stakeholders, partners, etc. (e.g., the U.S. church, technology, regional or industry trends, etc.). These areas would be determined with the organization's leadership.
5. Compiles survey results, interview learnings, organizational artifacts, and workshop content into the **Strategy Lab package**. This pre-read package enables, equips, and prepares Strategy Lab participants, who will be directly involved in crafting the initial draft of the strategy, with a deep understanding of the organization's history and current state. It provides the necessary foundation to help Strategy Lab participants reflect and brainstorm ideas ahead of the workshop.
6. Facilitates Strategy Lab preparation session with participants to review the package and prepare for the workshop.

Phase 2: Design

On Mission facilitates an onsite Strategy Lab over two days with 6-8 hours of facilitation per day. Core activities for the Strategy Lab include:

1. Review the mission, vision, values, and organizational history.
2. Review outputs from the listening and research phase including stakeholder listening, strategy scans, and spiritual discernment. Identify themes and trends.
3. Brainstorm strengths, weaknesses, opportunities, and threats (SWOT). Discern the key challenges and opportunities.
4. Draft strategic objectives and key results (OKRs).
    a. Objectives (O) are often narrative but may contain a specific target number. They bring inspiration and clarity to them team about where to focus.
    b. The key results (KRs) for each objective include numeric metrics to help define success and measure progress on the objective.
5. Develop a strategy execution and management plan.

Phase 3: Validation & Finalization

On Mission works with the Client on OKR refinement before finalization.

1. In the validation process, the Client will share the draft OKRs with various stakeholders (typically staff and board) for feedback. After feedback is collected, On Mission continues to coach the Client on OKR refinement.
2. Once the final draft is developed, the Client shares it with the board for approval.
3. Thereafter, OKR owners set annual and quarterly milestones along with strategy actions to achieve the goals. Pacing and resourcing discussions follow.

Strategy Launch & On-going Strategy Management

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On Mission provides tailored coaching and assistance to equip the Client with the necessary resources for on-going strategy management.

1. With support from On Mission as needed, finalize strategy execution resources (one-time activities with annual refinement as needed):
    a. Strategy Dashboard design
    b. Quarterly Strategy Progress Report design
    c. Strategy Launch and Communications Plan
2. Client to communicate the strategy to internal and external stakeholders.
3. Client to begin strategy management cadences: (Q1 of the strategic planning period)
    a. Monthly Strategy Progress Check-ins with OKR owners
        i. Review the past month's strategy actions or commitments (lead activities) and progress made on the overall goals (lag results).
        ii. Share commitments for the following month.
        iii. Discuss challenges encountered or lessons learned.
    b. Quarterly Strategy Progress Report to stakeholders
    c. Quarterly Strategy Progress Review
        i. Includes presentations and discussions with leadership and board

    d. Strategy Progress Communication & Celebration
        i. Frequency to be determined by the Client (quarterly, bi-annually, or annually)
    e. Annual Strategy Reviews with leadership and the board
        i. OKR owners reflect on the past year and to share plans for the year ahead, refine OKR measures, align resourcing to milestones and goals for the year; The review of the fourth quarter may be included as desired.
        ii. After reviewing with the OKR owners, a board-level review follows with an emphasis on lessons learned and plans for the year ahead.

ENGAGEMENT OUTCOMES

On Mission's *Strategy Design & Execution* process results in:

1. **Strategic goals (OKRs)** to focus and coordinate action throughout the strategic plan period
    a. Strategic goals are organized in an OKR format where each goal has a clear, inspiring objective with one to five supporting key results. Key results are measures or metrics that define and help to show progress toward the goal. This focused set of OKRs capture what is most critical for the organization to move toward greater Mission fulfillment in the season ahead.

2. **Strategy execution plan** to guide strategy implementation and management
    a. OKRs are monitored through on-going strategy management routines established in the strategy execution phases of the process. Key components of this include:
        i. Strategy dashboard: A tool that provides a snapshot of strategy progress which OKR owners can update throughout the plan period.
        ii. Communications plan including strategy launch and on-going internal and external communications.

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iii. Strategy management rhythms (outlined above).

3. **On-going support** through the first year of the strategic plan to ensure success in implementation
    a. Tailored support including executive advisory sessions, support in team-level strategy check-ins and reviews, help the team adapt to new cadences and get clarity on the process.

4. **Development of organizational KPIs and reporting approaches** (Optional add-on)
    a. For organizations that have not yet developed key performance indicators (KPIs) to monitor on-going organizational health, the *Measure & Manage What Matters Workshop* and/or advisory sessions, may be added.

    b. KPIs enable leaders to measure and manage the performance and progress toward Mission fulfillment. Unlike OKRs, these metrics change infrequently.
    c. When organizations do not have regular organizational performance reporting, they often incorporate “business-as-usual” goals into their strategic plans. This results in cluttered or unfocused strategies. Unfocused strategic plans fail to provide guidance on what changes are needed for the season ahead.
    d. The *Measure & Manage What Matters Workshop* helps teams select measures that capture on-going organizational health and performance related to its unique model. On-going KPI reporting informs decision making as well as strategy to ensure continued Mission fulfillment.
    e. This workshop results in a list of KPIs with definitions and proposed frequencies of measurement. As requested, On Mission supports the development of KPI report templates and reporting rhythms for the Client’s use going forward.

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