

Has Your Organization Successfully Moved from Strategic Planning to Implementation?

Bridgespan Group Manager Laura Lanzerotti recently asked members of the Bridgestar LinkedIn communities about their organizations' experiences moving from strategic planning to implementation. Their answers helped inform Bridgespan's new guide, "[Living into Your Strategic Plan: A Guide to Implementation that Gets Results](#)." The resulting conversation, shared below, potentially provides useful advice to those nonprofit leaders who are moving from strategy to implementation within their own organizations.

Laura Lanzerotti, Manager, The Bridgespan Group

Has your organization successfully moved from strategic planning to implementation? What advice would you give other nonprofit leaders who are struggling to execute their strategy?

Comments

Fred, President & CEO

While most organizations can visualize the long-term picture, the challenge is implementing tomorrow's strategic objectives with yesterday's logic. The following are the challenges, in no particular order, that I have experienced in 30+ years of nonprofit management: 1) Staffing: Recognizing that staffing expertise available today may not be what's required to implement future programming objectives is easy. Re-staffing and/or training is key. If staff, vision, expertise, and capacity is not in line with the objectives, the process will flounder, changes will occur, and they may not be pretty; 2) Programming: Programming needs to shift from existing committees, events, and activities to future requirements. This usually requires a change in the overall structure, reporting chain of command, decision making process, and removing older, established, nonperforming activities from the programs; 3) Funding: The revenue stream and its components also need to reflect and be structured to meet the new objectives. These changes are systemic and cause unrest; and, 4) Commitment: This is really the tough one. Once change begins, efforts will be made to hang on to sacred cows that will, if allowed, drain the life from the future. The full board, committee leadership structure, and the supporting community must be on board with this.

Laurie, President

Having gone through an extensive three-year long organizational analysis, strategic planning, goal setting, and evaluation process funded by support from a foundation, I think leadership holding it together

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is key. Staff need to know exactly what they bring to the table that moves the organization forward ongoingly or they undoubtedly begin to lose interest and investment in the process.

Andrew, Former Executive Director

My \$0.02 into the conversation is to help staff feel a sense of place in the new plan. Not just what they will do differently, or what will be expected of them, or the new grand vision, but a meaningful connection to a felt sense of personal purpose. Organizations can provide transition coaching to help this process. I have seen open space and Appreciative Inquiry conversations be very effective at giving staff the ability to generate their own processes, so the overall change is not as top down (open source). I also think a certain amount of attrition and new eyes are important and natural parts of new direction. Finally, make the changes to all the little things that say "old strategy." This includes visual cues, ways of speaking/language, processes and materials used, configuration of physical spaces, titles of forms, etc. Make it someone's job to immerse the organization in the new operating reality.

Gwendolyn, Executive Director

I believe the first step is actually defining the purpose of strategic planning for your team and engaging all of them in the process. We recently had a strategic planning retreat that involved everyone on our core team. We discussed and created the goals together and then we drilled it down into 90-day action plans with specific tactics for each goal. We are now working on taking the 90-day action plan and drilling down even further to specific processes/steps. Engaging the team was important because now they are fully bought into and engaged in the process. We review our 90-day action plan at each meeting and we have check-in dates prior to that.

Heide, Executive Director

I strongly agree with Fred's comments about all the pieces being in place. At the end of a year-long strategic planning process, the board took the pieces and glued them together, without looking at how they fit together. The staffing, funding, marketing, and goals did not support each other. Now with many new board members, we have to take a plan that was not workable and build one that is. I have had success with plans that were thought through and all the elements fit together. We have had consistent failure when all the pieces are stuck together without making sure they fit and support each other. To move from planning to implementation, the plan has to be realistic and the various portions need to support each other, making sure the resources are in place and the goals are clear.

Daniel, Chief Operating Officer

I would put forth that follow-through on execution often boils down to resolving to have the discipline and

to apply a framework that makes sense to the organization to use in guiding this disciplined follow-through. One simple suggestion: form a "strategy implementation working group" and utilize Action Learning methodology to monthly working meetings.

Cyril, Director, Member and Corporate Services

While every organization has a different environment, I found the ADKAR model helps you identify where yours is: click <http://www.change-management.com/tutorial-adkar-overview.htm> [LINK]

Sudha, VP, Finance and Administration

Key to success is to have no more than two or three overarching strategic initiatives, which must weave through the fabric of all mission areas. There must be one strong driver in the senior team who is able to drive this strategic vision at all times and not let it be left in the back burner. A work-flow document with time line and staff responsible for the initiatives which is linked to budget goals helps the plan in its implementation.

Pat, Associate Director, Finance

Our organization has been implementing the strategic plan through the last few years. The business plans of each area of business is responsible to draw back to the overall strategic plan. At each year end of a three-year plan there is a reporting that happens to the internal leadership group and the board. This helps keep the leadership on track and makes them accountable to implement the plan over the three years.

Josephine, Chief Financial Officer

We just completed a strategic plan, which was approved in 2005 and implemented over our fiscal years 2006-2010. The most important steps to implementation are to identify the most important of all identified goals, assign a responsible manager, approve budget if applicable, and use a worksheet tool to track progress and outcome measurement. We kept costs separate for budget management. Another important component of our successful implementation was the continuance of a Strategic Plan Committee of senior managers who made sure the implementation was done. Upper management support is also imperative.

Kurt, Chief Operating Officer

I've used what I call a "project grid" that outlines each initiative/project in the strategic plan. In this grid I have identified a project sponsor, project lead, date of expected completion and other items. I review this with our national board at each meeting and work with staff on a monthly basis to make sure that the

projects are moving as expected. By using such a tool, one can ensure accountability and deliver on the strategic plan's vision.

Ken, VP Strategic Growth Initiatives

We build our annual goals around the same categories in the strategic plan. This creates a framework that encourages implementation and follows through from that original vision and plan.

Most important is to have the right people on the bus, I believe. Otherwise implementation can become forced and mechanical. Delivering on strategic plans mechanically is, arguably, a recipe for disaster—or at least lukewarm disengagement and therefore weak results/impact. With little or no spirit and drive/ownership behind implementation, others on the staff see that and are not motivated to do their part in driving the plan forward.

Parveen, Chief Operating Officer

Several key factors, have you: 1) addressed and completed a SWOT and gap analysis, sometimes the best laid strategies fail without resources; 2) staffed to get the "right people on the bus"; 3) aligned each person's personal goals to department goals to organizational goals...show every person in the org how they contribute and align for a win-win; 4) set realistic timelines to achieve goals in your plan; 5) set incremental milestones and review often; 6) communicate to all key stakeholders; and 7) celebrate your wins. Check out the baldrige criteria at baldrige.nist.gov for more info...the key is alignment of everything you do across the organization at every level.

Charlie, Operations Director

Another key component of this is team members' accountability to one another. We do quite a bit of consulting with churches and ministries and find that teams with low trust environments rarely see success in planning and implementing. It's critical to begin with the attitudes of the team then move them to caring about collective results—only then do we find that people become motivated, encouraged and prompted to doing what's already been planned.

Donna, VP Chief Operating Officer

Accountability is key. Many strategic plans sit on shelves once completed. Assure that someone is assigned to follow through on specific steps and goals, and set realistic timelines. Then follow-up, follow-up, follow-up. It also helps to have a "champion" to stay on top of the project who keeps pushing and keeps the energy flowing.

Eliot, Deputy Executive Director

We start by allowing everyone in the agency a voice in the strategic planning process. This improves "buy in" and increases the likelihood that implementation will proceed smoothly. Because we are a multi-state agency, we have each state director create specific goals that derive from the agency-wide plan. On-going monitoring and including goals in performance plans is critical. Although we have not used the Balanced Scorecard, it has been adapted for non-profits and is an excellent strategic planning and management system.

Sue, Chief Strategic Officer

We did a year-long planning process five years ago which resulted in a transformational strategic plan. We translated it into the Balanced Scorecard framework, and today have the makings of a case study with significant and measurable results in our business model, partnerships, board/governance, and staff/HR to name a few. It has been quite a ride, but while we are a very different organization today, we still have the same CEO who is coming up on marking his 25-year term! Happy to share more details but the moral (s) of the story is: 1) strategic planning is really only effective if it is driving growth or change; 2) management, board, and staff embrace it; and 3) measuring success is essential to actual implementation.

Kym, Chief Operating Officer

In addition to these excellent observations and suggestions, make sure that you invest adequate time in change management planning—ensuring that you can still be operational during the implementation phase. How do you move from here to there? (It can contain some challenging issues.) Stakeholders have often been able to explain to me and others why some things look good on paper, but need tweaking to make them work on the ground.

Monique, President

We are big fans of the Balanced Scorecard and we feel that it is critically important for each member of the team to know which Benchmarks they are personally responsible for. This way each team member knows how their work contributes to the organization's overall success. And how the quality of their work links to our future funding (since we use the balance scorecard with our funders as well).

Priya, Director, Operations

We embarked upon a strategic planning process that led to a total rejuvenation of the organization. We are in year three of implementation and it has been a challenging ride. We restructured the organization for growth, built an aggressive fund-raising plan and engaged key donors in dialogues for growth. The

team has shifted gears in working and change has started setting in. We have the entire journey documented and have been sharing it with organizations in Nepal, Malawi, and Bangladesh as well.

Ross, Chief Operating Officer

Our experience closely matches Sue's, except we started only three years ago. The Balanced Score Card is crucial but we've also learned that the strategic plan must continually evolve rather than being locked in for three or five years. Ours is reviewed annually and we've generally identified one or more strategic outcomes/objectives that change, merge or disappear. Implementation has also benefitted from our annual strategic cycle that starts with a performance review, which informs the strategic review, leading to revised business unit plans, which then generate the budget for each unit, confirming forward programs and initiatives, which are then subject to performance review etc.

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