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CFRE CAP

DIY Strategic Planning



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for Success**

The background features a stylized cityscape with a yellow building on the left and a blue building on the right. The sky is light blue with white clouds. A yellow rectangular box is positioned in the upper center, containing the number '01.' in a bold, red, sans-serif font.

01.

What's wrong with strategic planning?

And how can we get it right?

We think that strategic planning is somehow special...

We need special thinking

We were thinking in black and white and now think in full color!

We need a tactical roadmap

We need practical action steps that are assignable to staff and board to work on



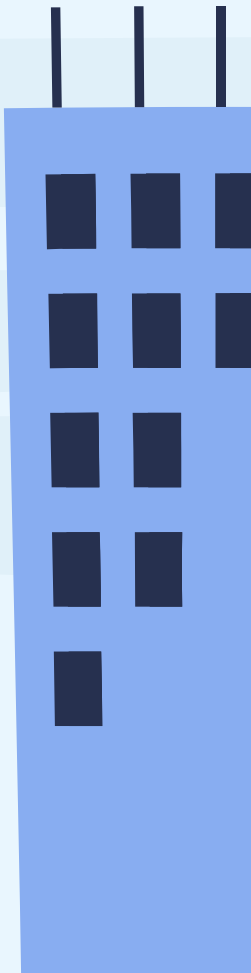
We need special people

We need “smart” people or people involved in strategy

We need blue sky ideas

Every idea and strategy should be on the table.

Strategic Planning is not concerned with HOW, it's concerned with WHAT you think about

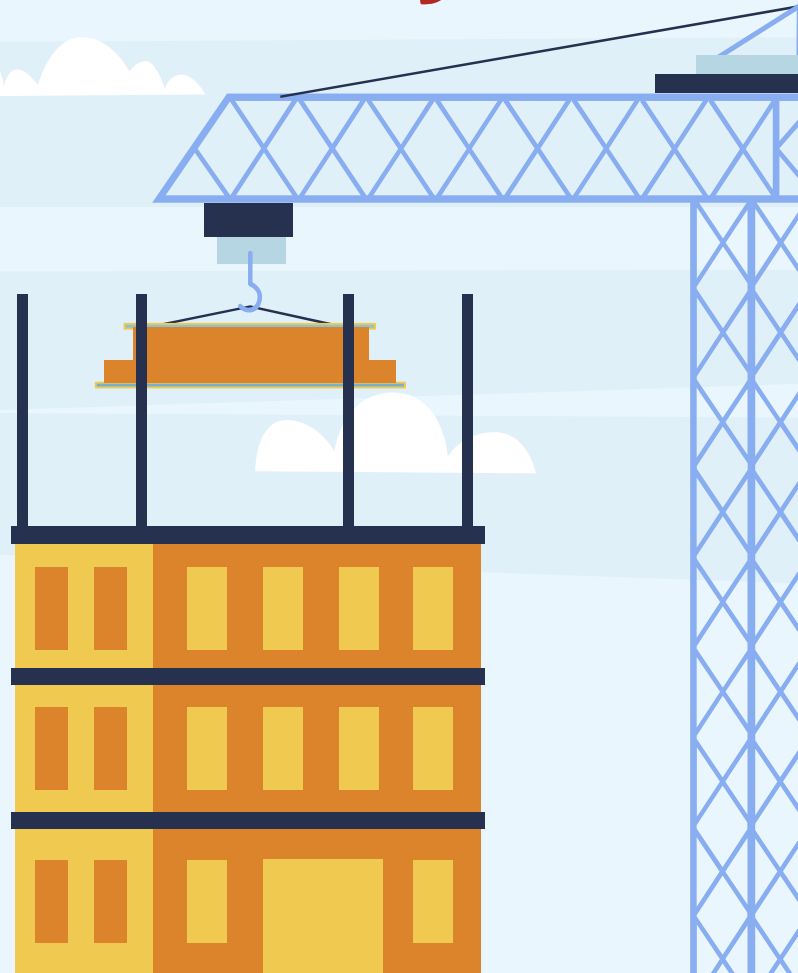
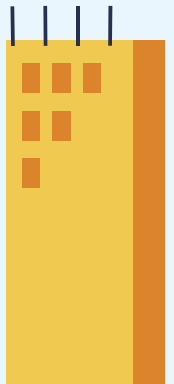
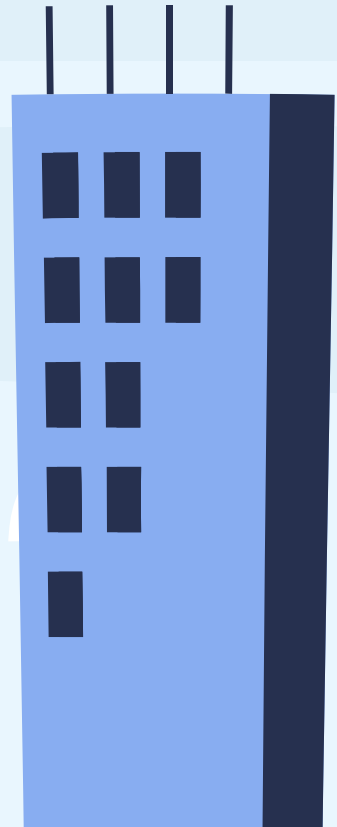




Three years

One year

Two years



Principles of strategic planning



People

Who will be involved?



Data

How will we measure the process and outcomes?



Deliberate

Discuss the organization's problems and solutions



Decide

Determine what the organization will do and **not** do



Deliverable

Design the plan and the strategy map



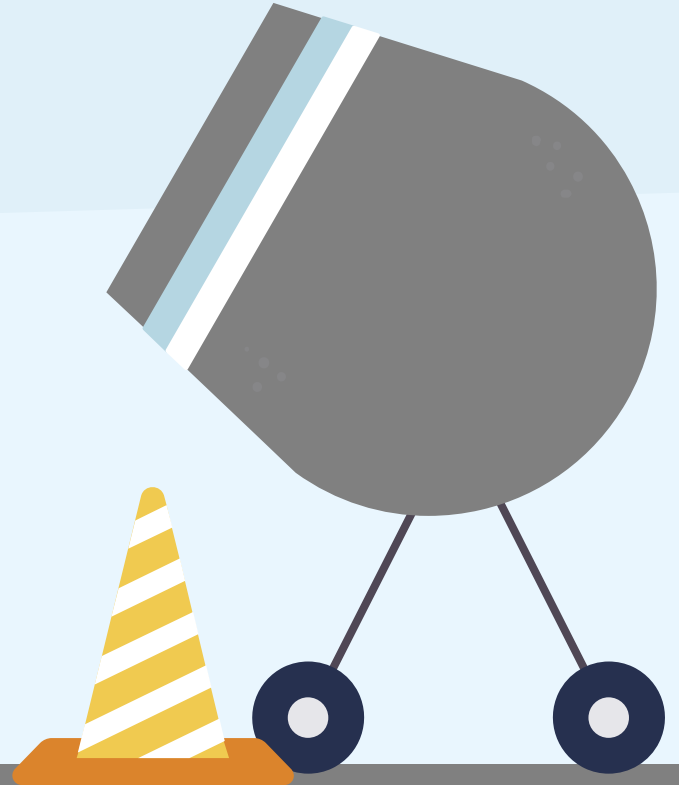
Determination

How will you refer back to the map to get where you need to go?

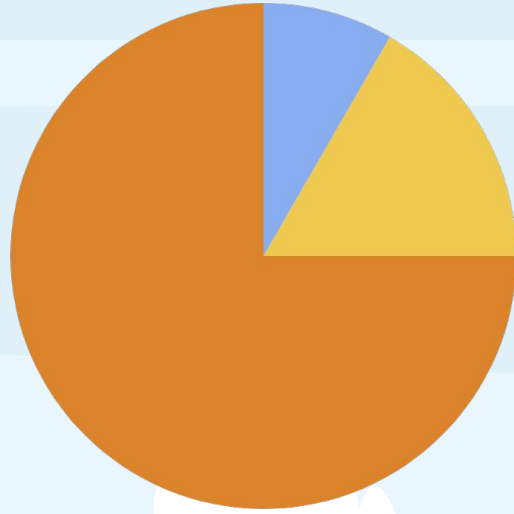


02

**Focus on what
you DON'T know**



Areas of Strategic Planning Process



10%

Known Knows

What we know we know
e.g. deliverables

30%

Known Don't Know

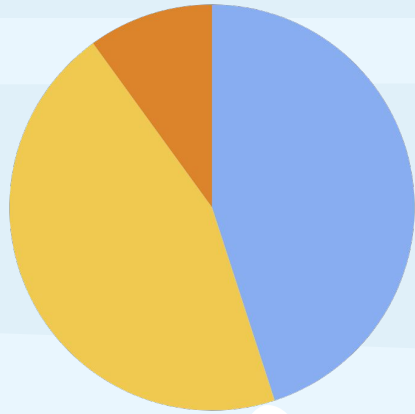
What we know we don't know
e.g. why is our retention rate low?

60%

Don't Know Don't Know

What we don't know we don't know
-- this is the area that is strategic

The Way We Do Strategic Planning?



45%

Known Knowns

What we know we know
e.g. deliverables

45%

Known Don't Know

What we know we don't know
e.g. why is our retention rate low?

5%

Don't Know Don't Know

What we don't know we don't know
-- this is the area that is strategic

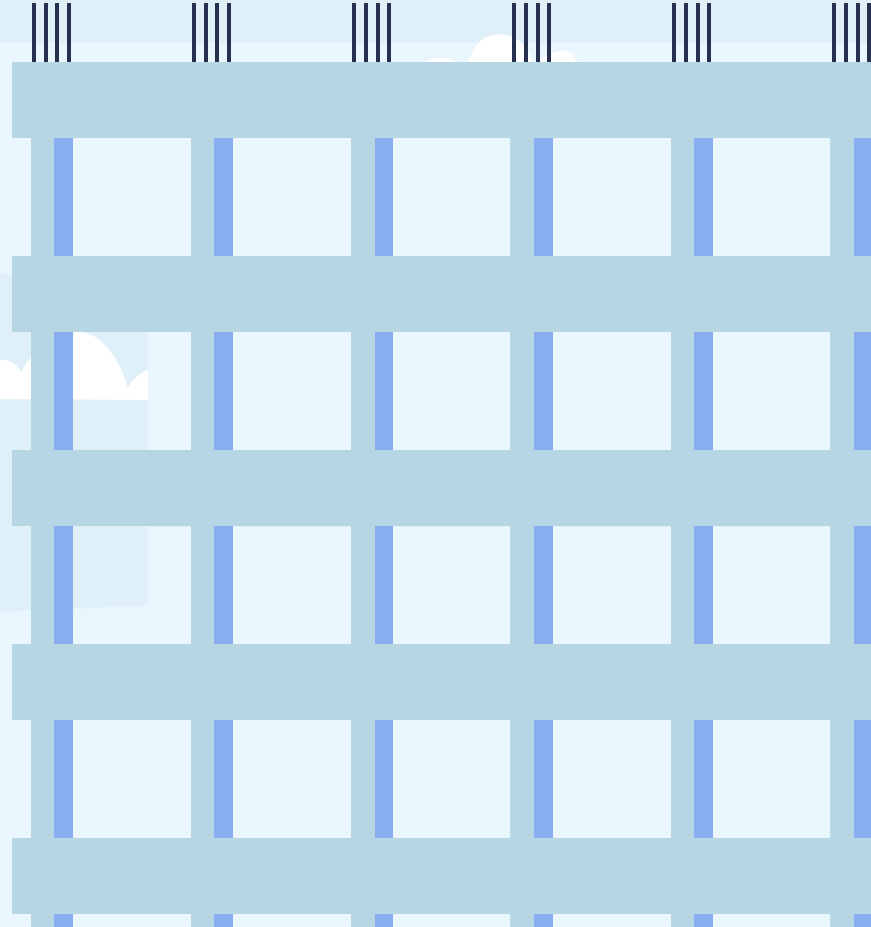
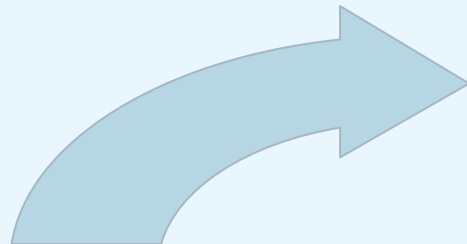
Why is it so important?

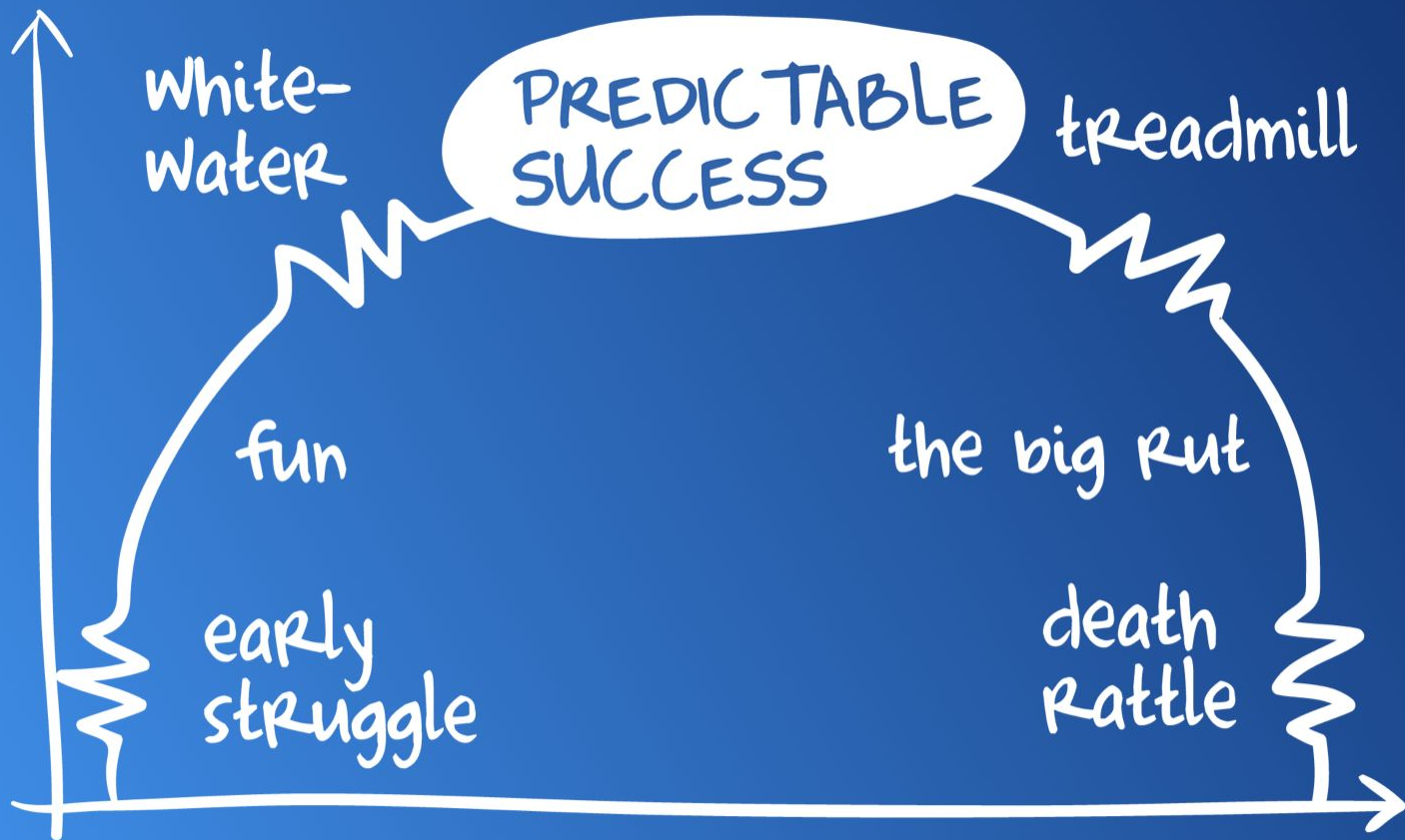
In the 1980s, Stasser and Titus conducted a study that “challenged the idea that group decisions are more informed than individual decisions.”

The result?

People discuss commonly held information much more frequently than uniquely held information. This inhibits problem-solving.

They called this: **common information effect.**





The Nonprofit Lifecycle Quiz

www.cheriankoshy.com/quiz

3 basic principles of strategy



Define and clarify your KK

What are the roles, processes, and expectations around your work



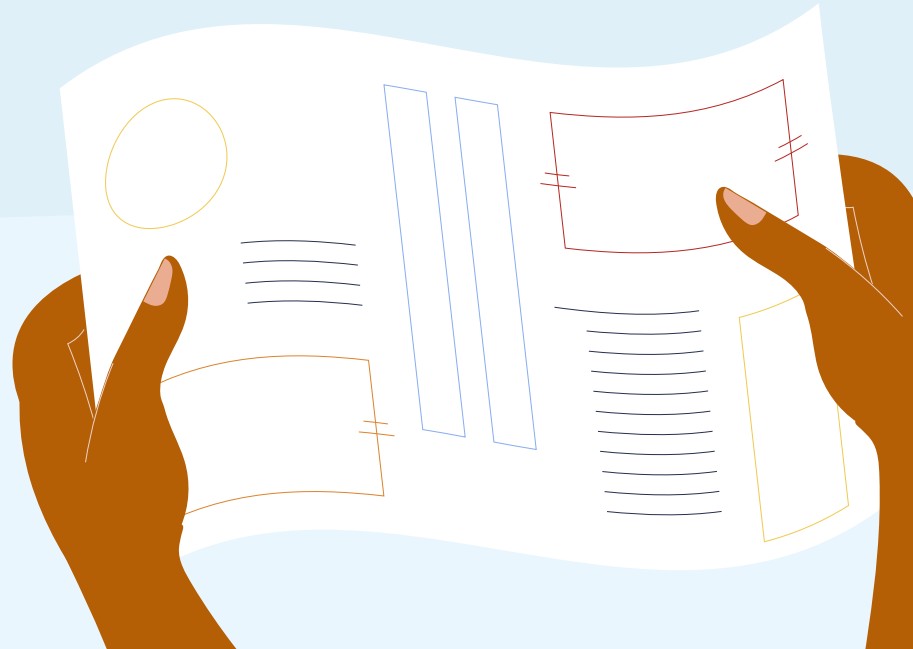
Define and clarify your KDK

What's on the horizon that you know you are going to work on and fix -- take these off the list. We KNOW about this and it's a business process issue, it's not strategic.



Understand DKDK

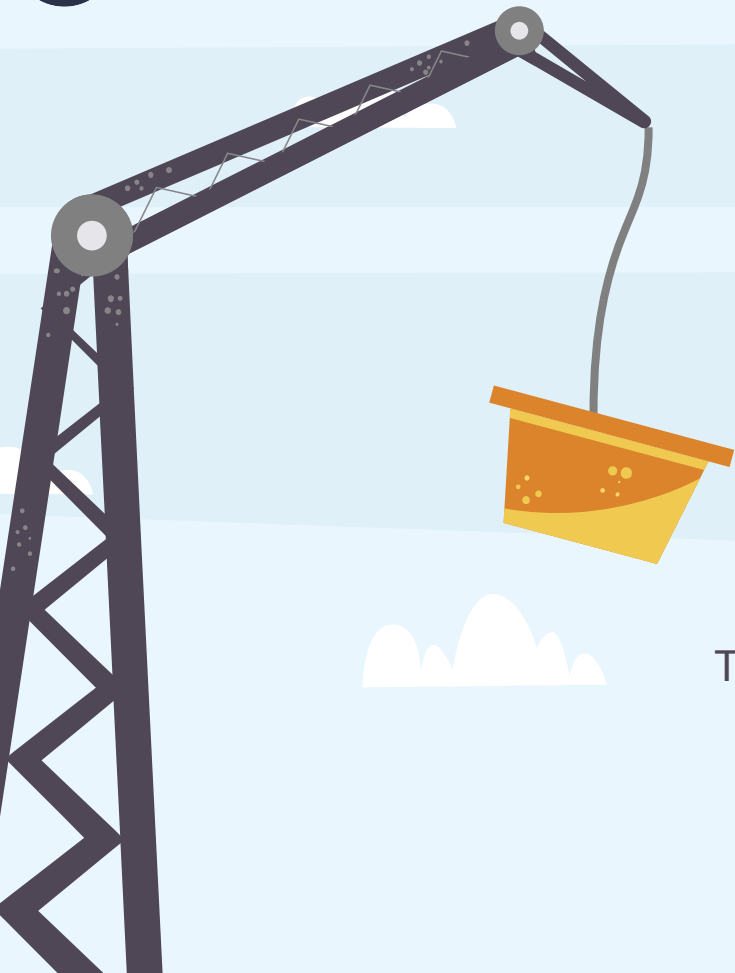
This will be different for each individual and each team -- this is why 'people' is so important and essential. Look back for pattern recognition.

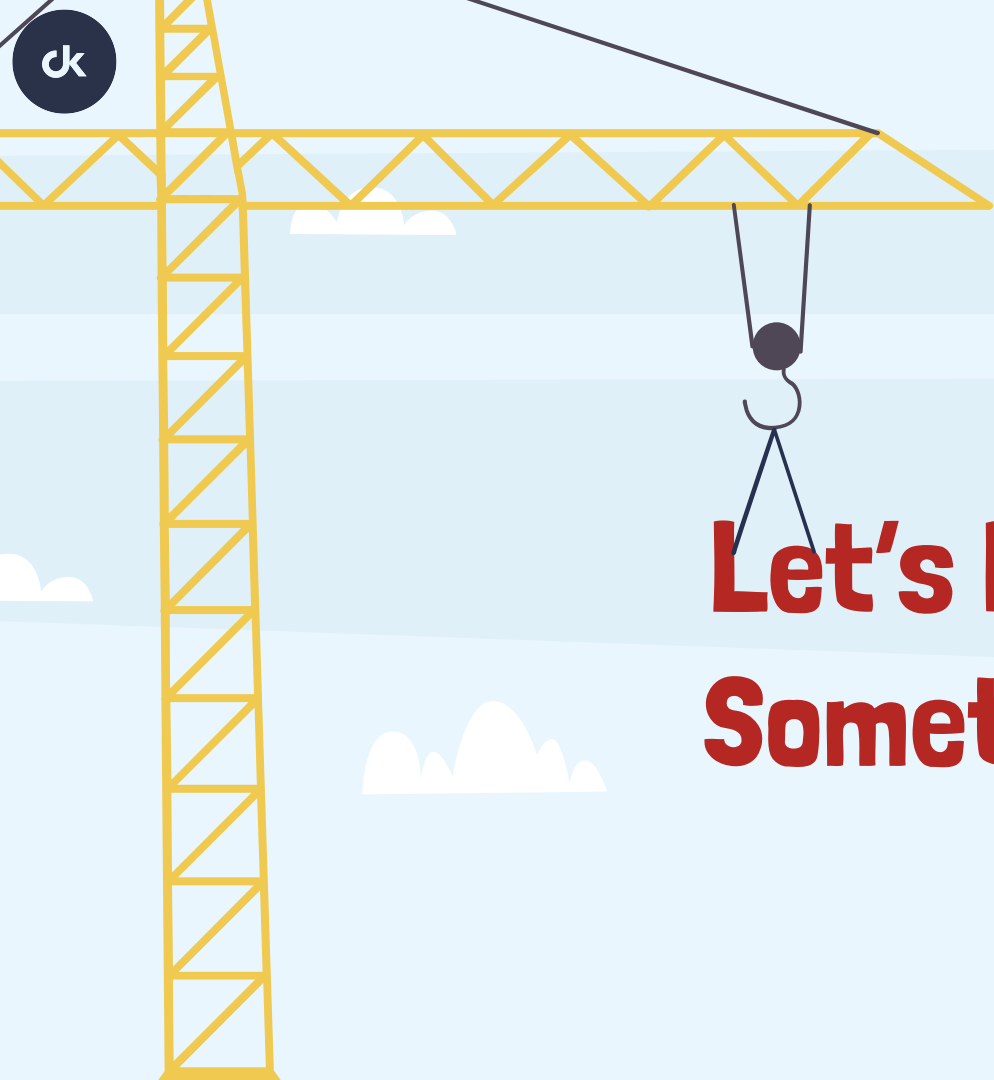


03

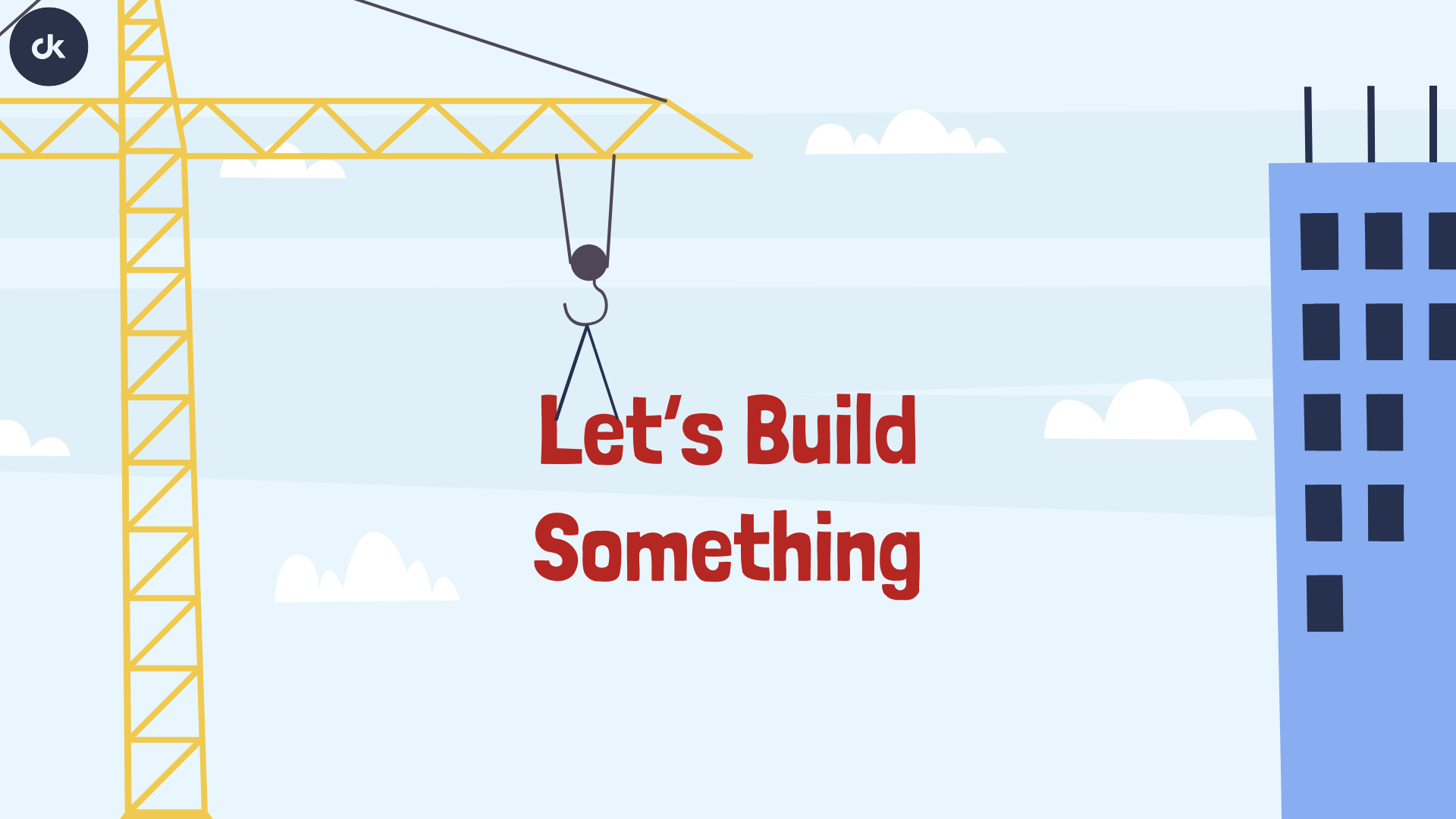
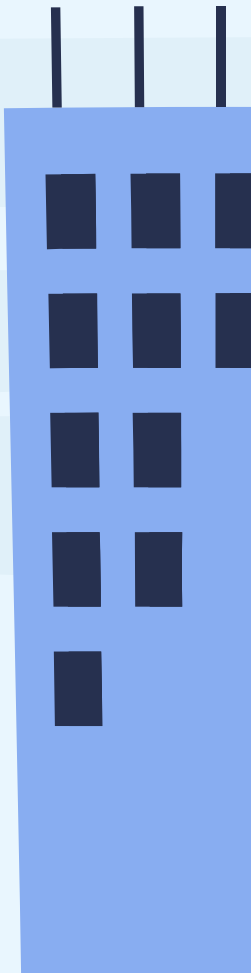
Define the box

This is a counter-intuitive truth but an essential one

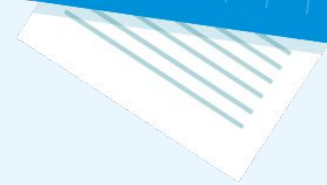
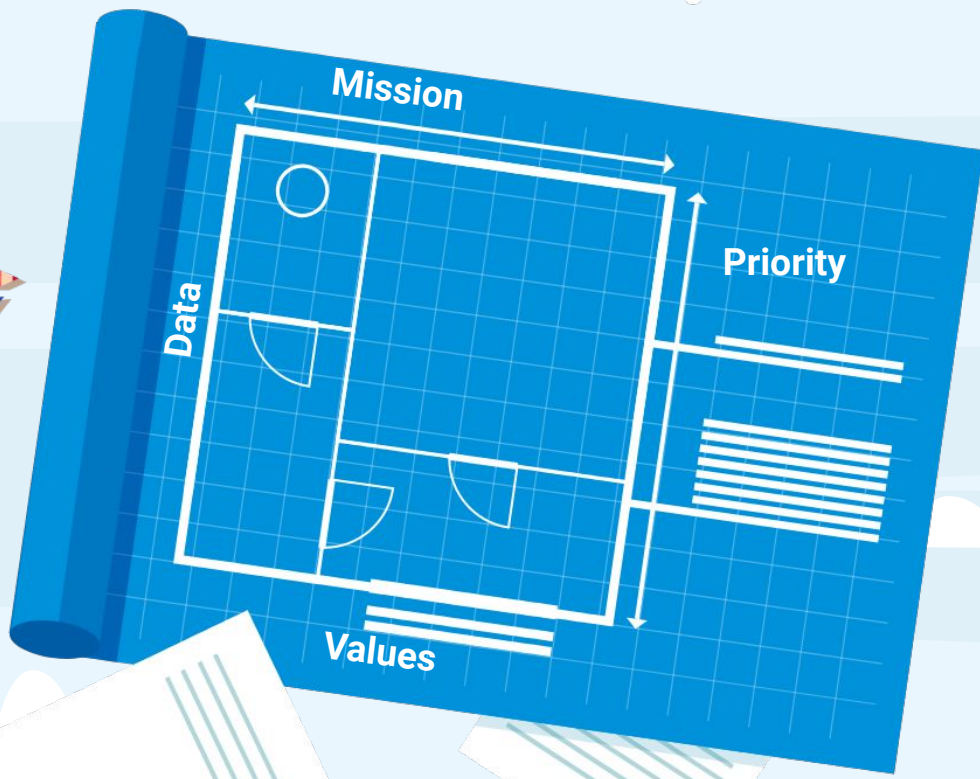




**Let's Build
Something**









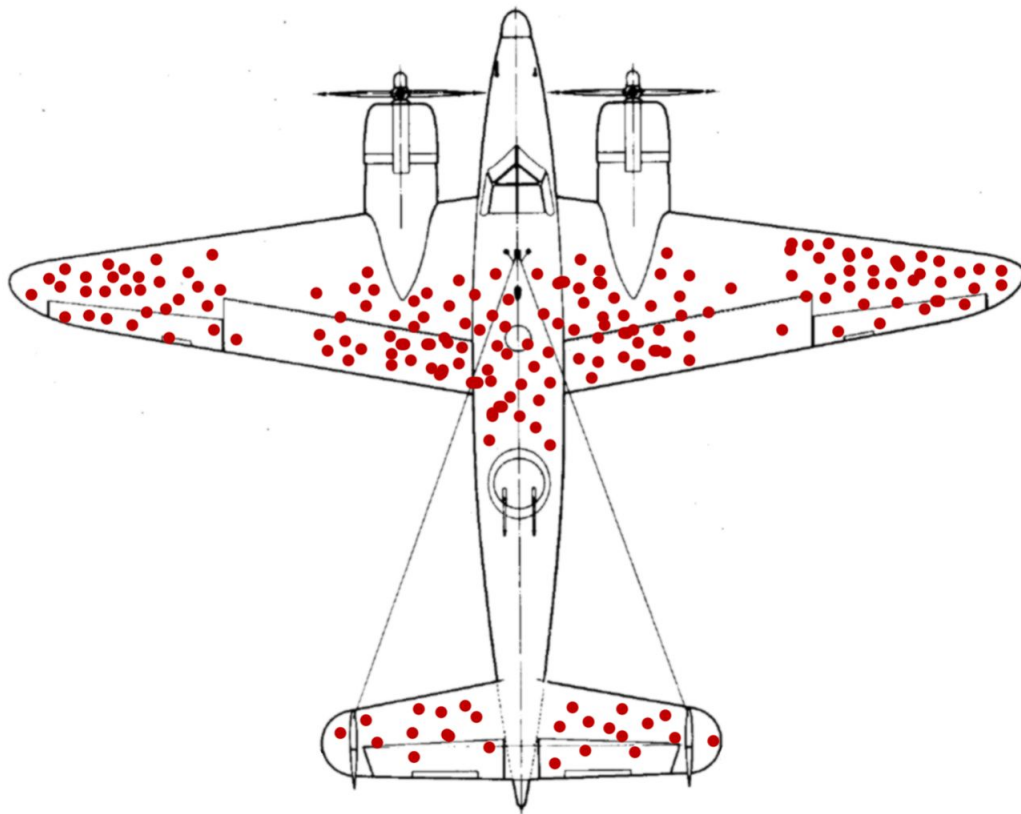
Greg McKeown

@GregoryMcKeown



The word priority came into the English language in the 1400s. It was singular. It meant the very first or prior thing. It stayed singular for the next five hundred years. Only in the 1900s did we pluralize the term and start talking about priorities.

Survivor Bias



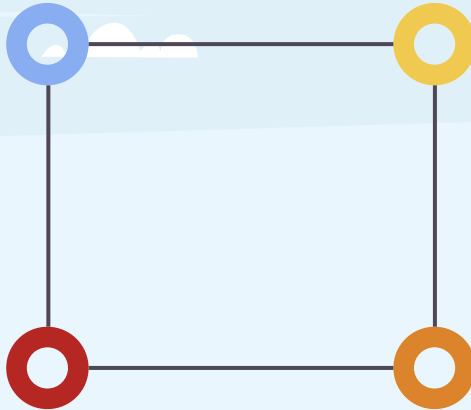
Fence in your planning

Mission/Vision

These are constraints on why you do what you and why that is important

Data

These are the object pieces of information that impact how you and your organization operate



Operational Realities

These are literal constraints on how, what, or who you work with.

Values & Culture

These are constraints based on what you believe and how you behave as an individual and as a group



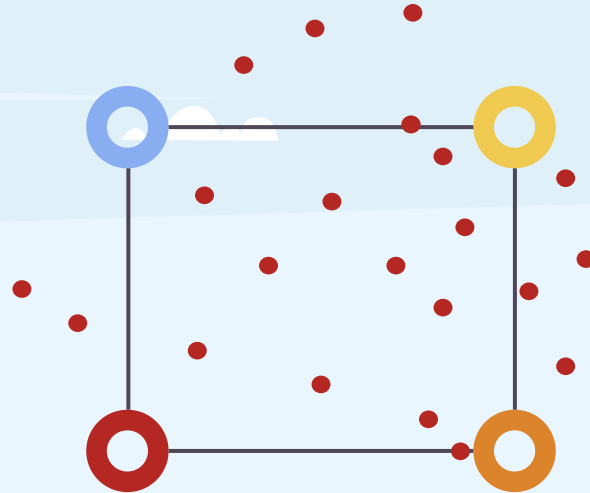
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Operational Realities

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Strategic planning is
not actionable unless
constrained by key
realities

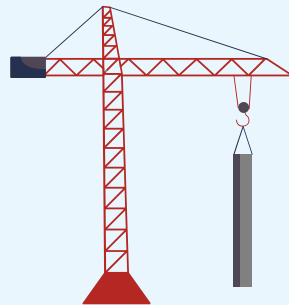


In house or outside help?



When should we DIY?

- It's you or a small team
- There's general agreement around KK and KDK
- There are no wrecking balls
- ALWAYS around systems, processes, and internal data

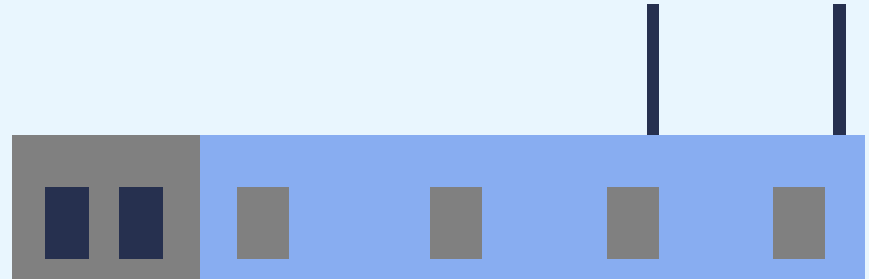
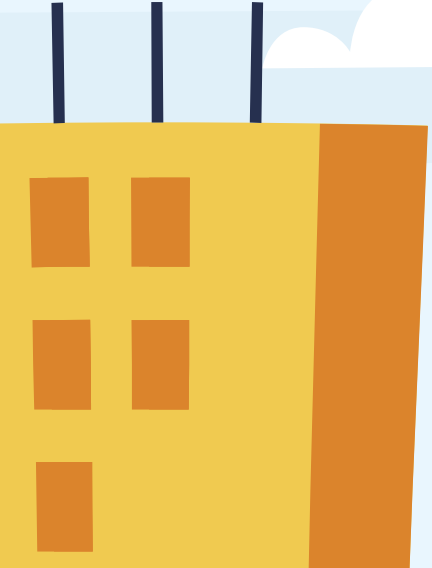


When can a professional help?

- When you don't have a true picture of the box especially values and culture
- When you don't have general agreement or a path to quickly clarify
- When there are deliberations that need to be moderated to be meaningful

04.

**Ask yourself these
questions**



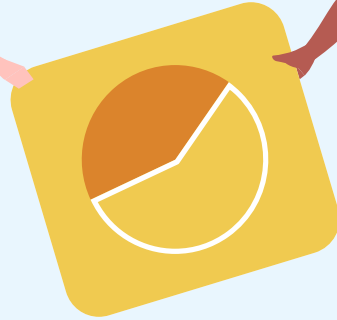


A few questions to ask:

- If your nonprofit closed today and a new one opened tomorrow, what would it do and how would it do it?
- What was the thing your nonprofit was worst at last year? What is the single thing that would fix it?
- What was the thing your nonprofit was best at last year? What is the single thing that would amplify it?
- What was the one metric you least liked hearing this past year? What would prevent that issue next year?
- What was the one metric you most liked hearing this past year? Did that metric matter? How can that be amplified?
- How do you measure your own success? Is that different from how others measure your success?
- Is there a person or department that held you back this year? What will be done about that?

Quantitative

Performance metrics,
revenue, other
measurable data



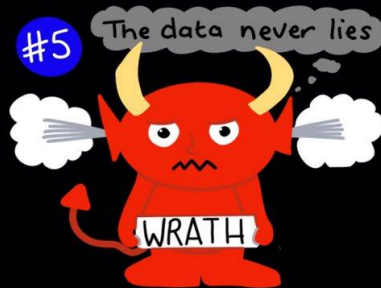
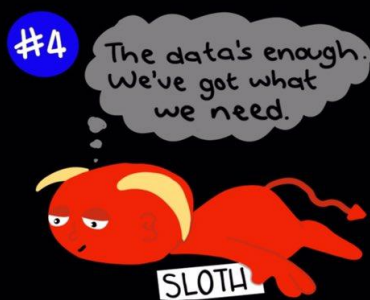
Qualitative

Interviews and
discussions with
stakeholders

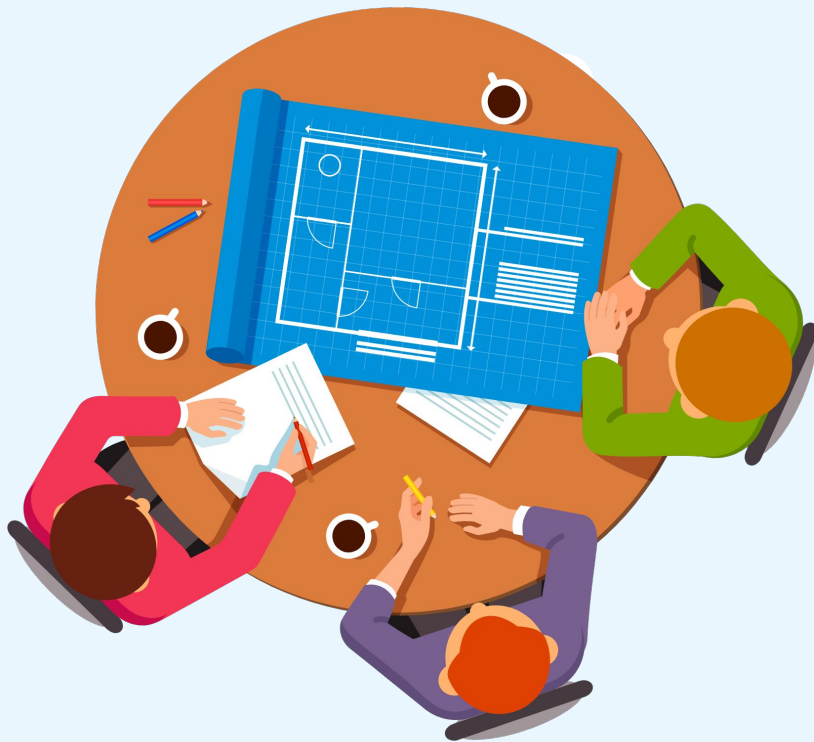


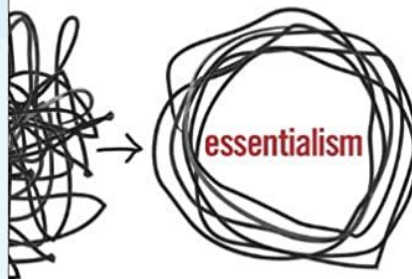
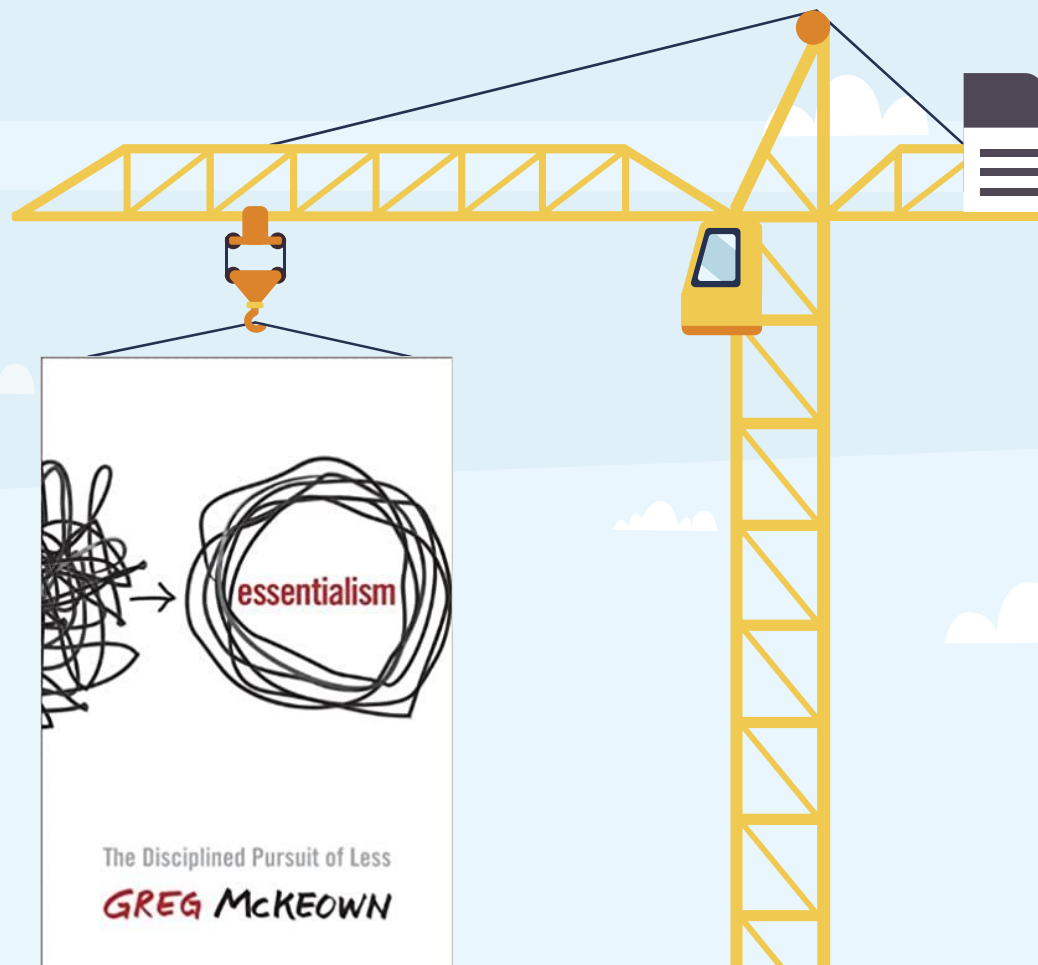
7 Deadly Data Sins:

—Illustration by Sketchnotes UK—



Deliberation on data and observations





The Disciplined Pursuit of Less

GREG MCKEOWN

What to hammer and what to cut



**Securely
Fasten**

Ideas, programs, practices
that validate your box



**Quickly
Remove**

Everything else; if it's
not an 'Absolutely!' it's
a 'Hard Pass'



'Has every chance of becoming a business classic'
Management Today

RICHARD RUMELT

GOOD
STRATEGY
BAD
STRATEGY

The Difference and Why It Matters

Good Strategy vs Bad Strategy

Good

Begins with the admission that there is always a specific problem

Begins with an implicit denial that there is a specific problem

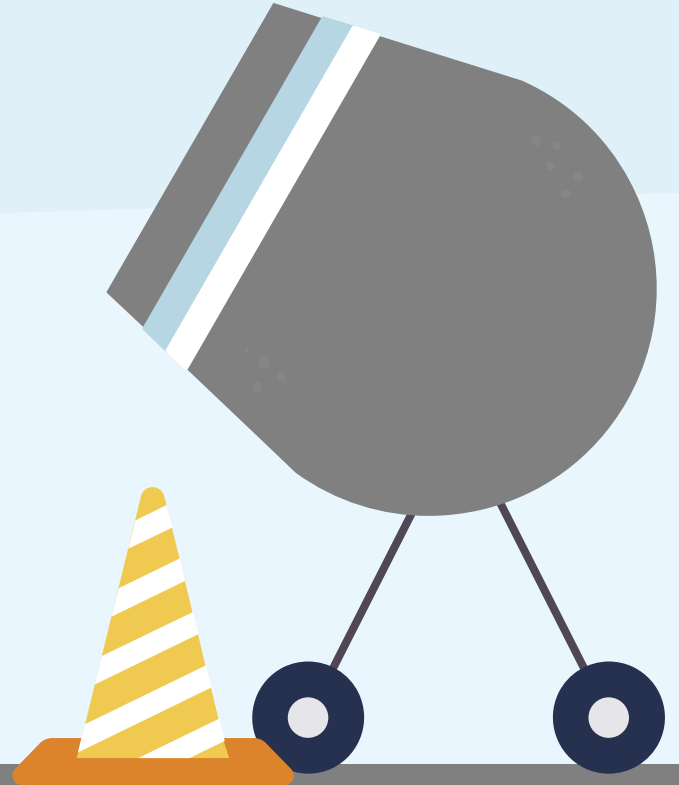
Bad



Good strategy is characterized by finding the one critical problem and then focuses and concentrates action and resources to address it

05

The Five Hows



Features of Bad Strategy



The Five How's: How to Make Your Plan Practical

01

02

03

04

05

How should we?

How would we?

How can we?

How do we?

How will we?

**Do NOT use a
facilitator for this!**

Strategy Tells Us:

What to do

A set of coherent actions we should do to address the problem we're facing

What not to do

A set of guidelines that prevent us from doing things we shouldn't

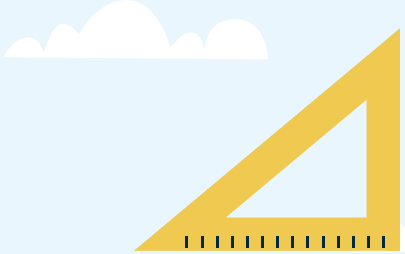


A stylized illustration of a crane with a yellow bucket, set against a background of horizontal light blue stripes and white clouds. The crane is on the left side of the frame, and the bucket is tilted towards the center.

06

Six keys to success *and sustainability

A stylized illustration of a blue building with four windows, located in the bottom right corner of the frame.



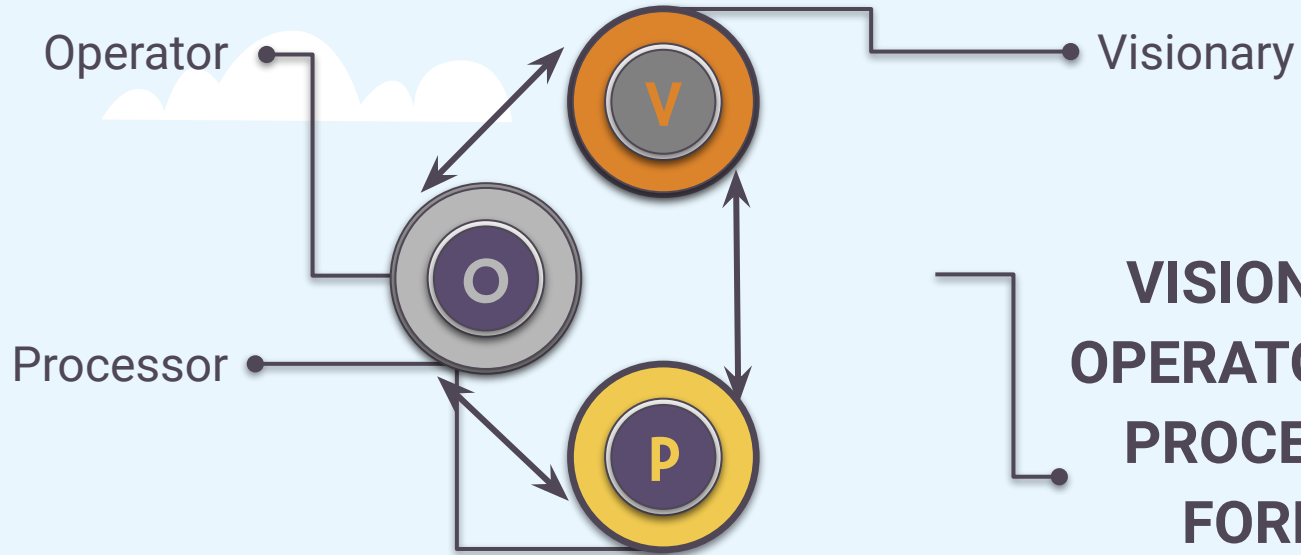
ONE VOICE
CENTRAL TEXAS

2016-2018 Strategic Plan

**A one page
overview of a
plan**

Member Engagement	Branding	Infrastructure	Standards	Advocacy
<p>Engage members more quickly and deeply</p> <ul style="list-style-type: none"> ✓ INCREASE MEETING ATTENDANCE ✓ EXPAND MEMBER ENGAGEMENT IN OVCT ACTIVITIES ✓ REDUCE NON-RENEWALS 	<p>Establish OVCT as a recognized, respected, & "go-to" resource for health & human services</p> <ul style="list-style-type: none"> ✓ INCREASE OVCT VISIBILITY ✓ INCREASE AWARENESS OF MEMBERS' IMPACT ✓ PROMOTE REFRAMING LANGUAGE 	<p>Build a solid foundation</p> <ul style="list-style-type: none"> ✓ CREATE ACTIVELY USED MISSION, VISION, & VALUES STATEMENTS ✓ RETAIN MEMBERS IN 403(B) ANCILLARY SERVICES AND HEALTH PLANS ✓ INCREASE PRODUCTS & SERVICES FOR MEMBERS ✓ ENSURE FINANCIAL VIABILITY 	<p>Act on key strategic internal and external opportunities</p> <ul style="list-style-type: none"> ✓ INCREASE CULTURAL PROFICIENCY ✓ SUPPORT THE DEVELOPMENT OF STRONG LEADERS ✓ EMPLOY BEST PRACTICES 	<p>Establish OVCT as the recognized leader in advocacy for HHS in Central Texas</p> <ul style="list-style-type: none"> ✓ DEVELOP PROCESS FOR DETERMINING ADVOCACY POSITIONS ✓ DEEPEN RELATIONSHIP WITH PUBLIC OFFICIALS ✓ INCREASE HHS INVESTMENT ✓ MOBILIZE MEMBERS ✓ TRAIN ON ADVOCACY

VOPS Triad



**VISIONARIES,
OPERATORS, AND
PROCESSORS
FORM AN
UNSTABLE TRIAD**

The Nonprofit Leadership Quiz

www.cheriankoshy.com/quiz

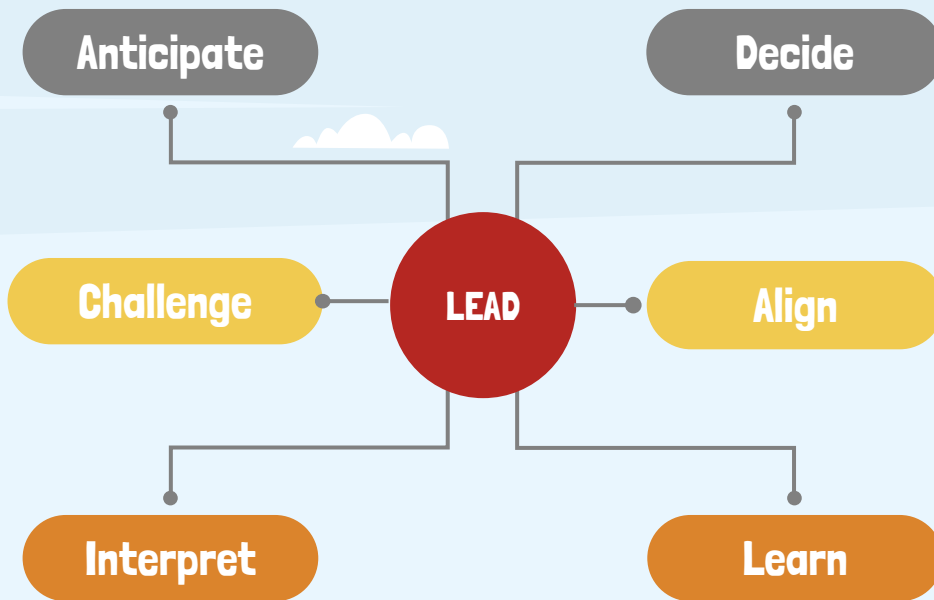
Proactive**Reactive****Anticipate****Decide****Challenge****Align****Interpret****Learn**

Leadership Assessment

Gather information from internal and external sources, predict moves and reactions

Reframe problems from various angles to understand root causes and seek out alternate viewpoints

Demonstrate curiosity and an open mind, test with others before coming to a conclusion



Balance long-term investment and short-term results, assess risks and unintended consequences

Assess change motives and limitations as well as conflicting interests; remove barriers to alignment

Course correct based on disconfirming evidence and communicate stories to aid learning

<https://hbr.org/2013/01/strategic-leadership-the-essential-skills>

Thanks!

If you have any questions about the Predictable Success strategic planning model or how it applies specifically to your nonprofit, don't hesitate to contact me.



@cherian_koshy



Cherian Koshy

www.cheriankoshy.com/quiz

