



helping you
to help others

Business and strategic planning

Robert Foster

Robert@redochre.org.uk



Agenda and running order for the day

- The importance of the organisational vision
- Compliance with internal and external legal requirements
- Confirming the beneficiary requirement
- Methodologies for deciding strategies - doing the right thing
- Creating options for delivery
- Understanding the roles of the Board and the SMT in setting, delivering, and monitoring the strategy
- Practical approaches to improving the delivery of the strategy - doing things right
- Awareness of financial and risk considerations
- Capturing, understanding, and monitoring delivery and the impact on changing strategic options
- Capturing and communicating the delivery in an action or business plan



A note on pacing!



This is an interactive session, with a broad scope (strategy, writing the business plan, implementation)

Zoom fatigue! Soft recess on the hour

If you have questions, please ask them.



Who are you?: Pop quiz

- Introduce yourself – why you're interested in BP
- What is the difference between
 - Strategic planning
 - Strategy
 - Strategic plan
 - Business plan
 - Implementation plan?
 - Do you have a strategy or business plan?



Strategy 101



* Body corporate, governing documentation (charitable objects) and legislation

Steps to success

Framework	Implication
Aspire Where do we want to go	Strategic objectives Vision/ targets
Assess How ready are we to go there	Capability platform Identify/diagnose ability to achieve vision
Architect What do we need to do to get there	Portfolio of initiatives Beneficiary deliverables & performance improvers
Act How do we manage the journey	Delivery model Execution and correct approach
Advance How do we keep moving forward	Continuous improvement infrastructure



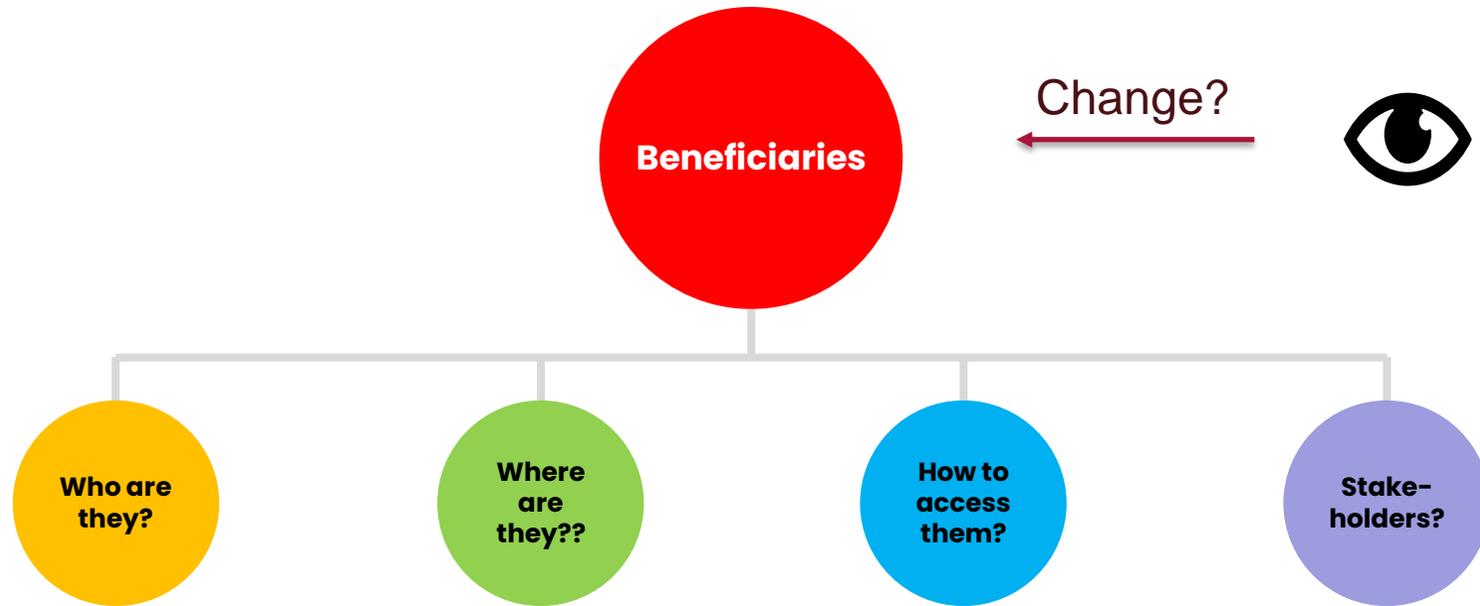
1. Aspire: What is the big picture (vision)?



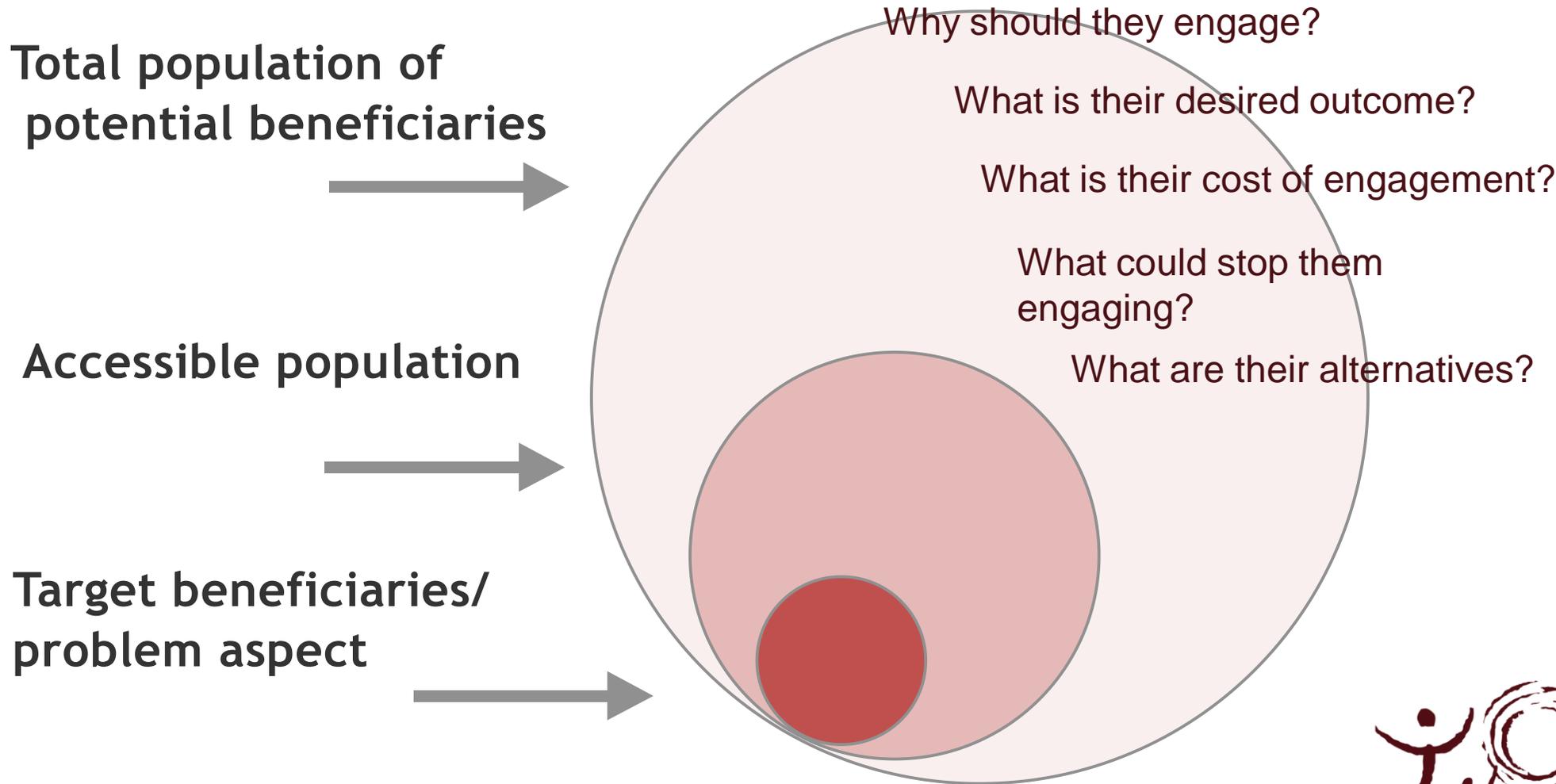
What problems are you trying to solve?

Questions	Insert answer
What is the problem?	
Who does it affect?	
How do you know this problem exists?	
Does anyone else agree with you?	
How widespread is it?	
Why is it a problem?	
How certain are you that you have identified the underlying cause and not just the symptoms?	
Why has it not been solved already?	

Beneficiary focus



Target population



2. Assess

- Look at the world
 - “Environmental analysis”, benchmarking, horizon scanning
- Outside your organisation
 - Needs analysis, competitor analysis, PEST/LE etc.
- Inside your organisation
 - Internal asset audit, SWOT



SWOT

Internal

External

Strengths (invest)

How effective is your management?
How effective are your operations?
How good is your governance?
How good are your relationships with funders?

Weaknesses (Defend)

How ineffective is your management?
How dysfunctional are your operations?
How poor is your Board/ system of governance?
How poorly are you regarded by funders?

Opportunities (Decide)

Are your beneficiary numbers growing or new ones appearing?
Will new technology improve your service delivery ?
Are there partnership opportunities?

Threats (Control/ divest)

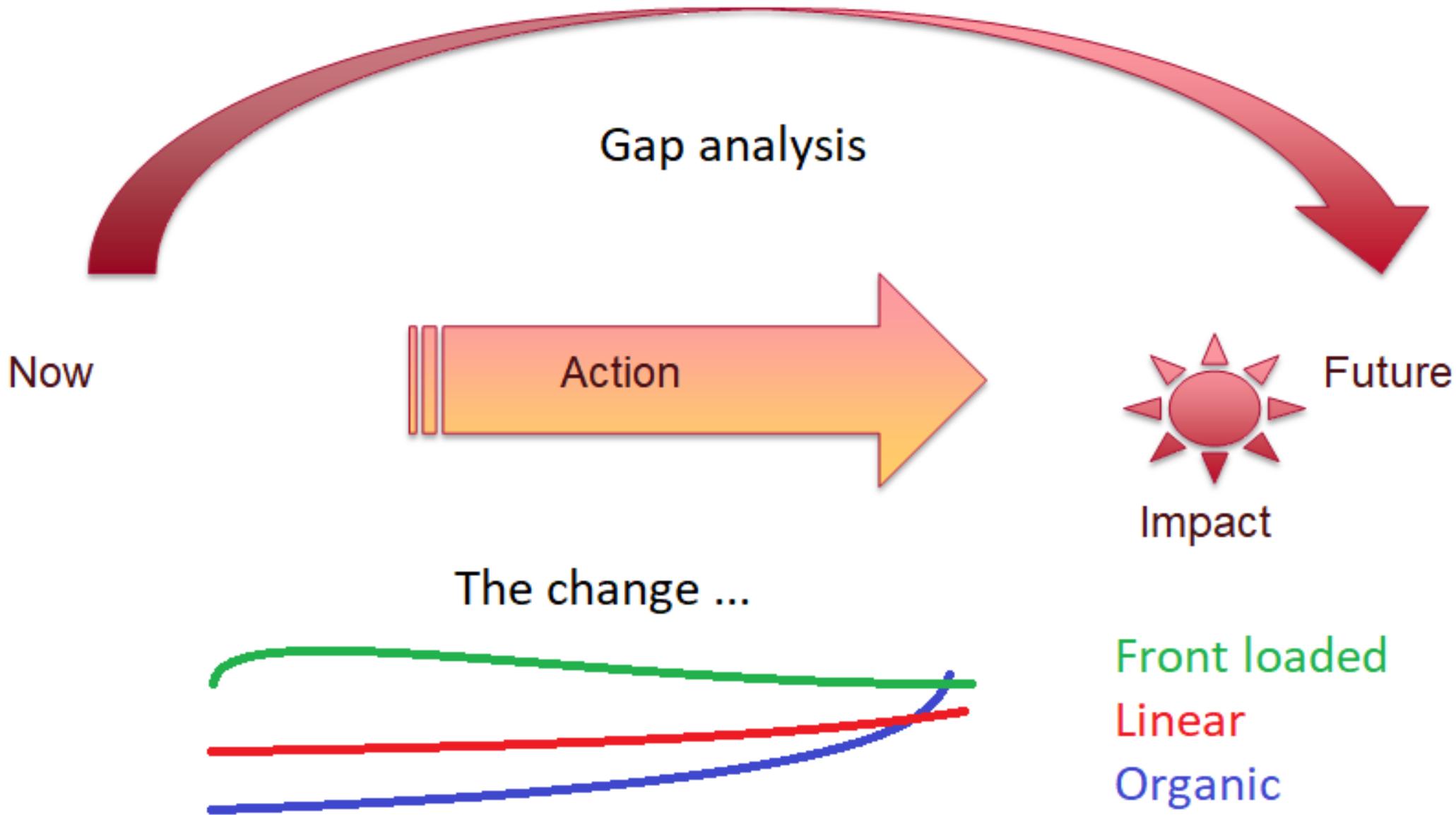
Are beneficiaries reducing?
Does a competitor have a technology advantage over you?
Are competitors forming partnerships?

PEST(LE)

Political	Economic
<p>Does existing or future legislation impact on you</p> <p>What activities will be disallowed by regulators</p> <p>What legal & ethical standards must you meet</p>	<p>How is financial situation affecting amount of grants/ contracts</p> <p>How is demand for your service changing</p> <p>Is there pressure to cut costs because of competition</p>
Social	Technological
<p>Is your target market growing or shrinking</p> <p>How are you perceived (brand)</p> <p>Are your beneficiary demographics changing</p>	<p>Is technology affecting your sector</p> <p>How is social media impacting on your operations</p> <p>Will changes in technology increase or decrease demands for your services</p>



3. Architect: Plan the future



Challenges

- What's stopping you from implementing your plan?
 - External challenges?
 - Internal restrictions?
 - Gaps?



Strategic options

- There are numerous opportunities for any charity
- These need to be considered and assessed
- Ideally there are will be a number that have potential

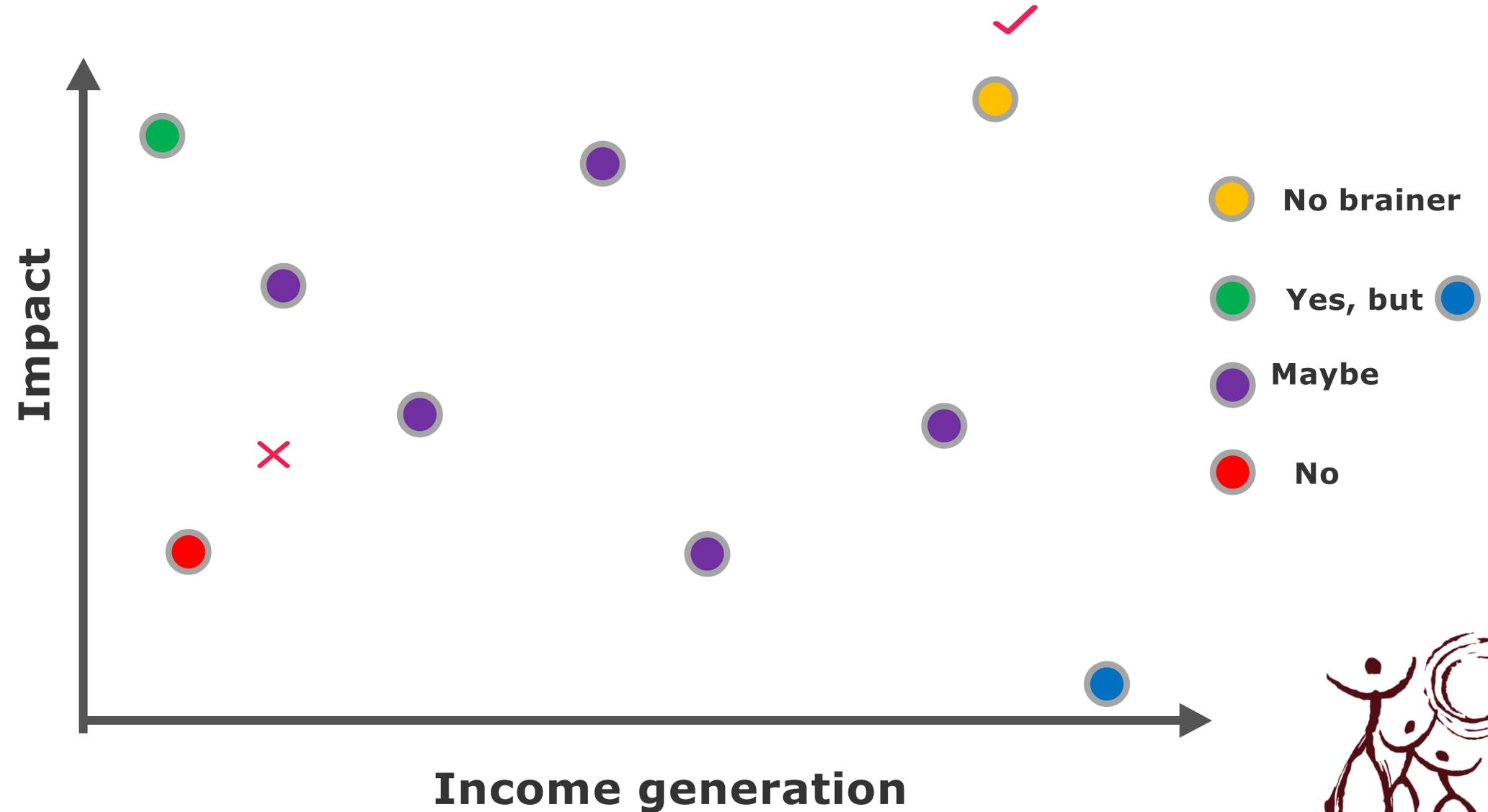


Typical strategic options

		Product / service / intervention	
		Existing	New
Market segments	Existing	<p>Market penetration strategy</p> <p>Selling more to the same customers, or to more of the same type of customer</p> <p>“Exploitation” strategy</p> <p>The accumulation of marginal gains</p> <p>ACTION: Sustain</p>	<p>Product and service development strategy</p> <p>Selling new services to existing customers, and existing customer types</p> <p>ACTION: Invest in Innovation</p>
	New	<p>Market development strategy</p> <p>Selling to new types of customers</p> <p>ACTION: Invest in outreach</p>	<p>Diversification strategy</p> <p>Selling new things to new types of customers</p> <p>CAVEAT: Highest risk</p>



Generating unrestricted income



Options Appraisal

	Option 1	Option 2	Option 3
Charitable object compliant			
Impact potential			
Income generation potential			
Risk appraisal			
Resource requirement			
Partnership potential			
Profile impact			
Weighting			
Score			
Ranking			



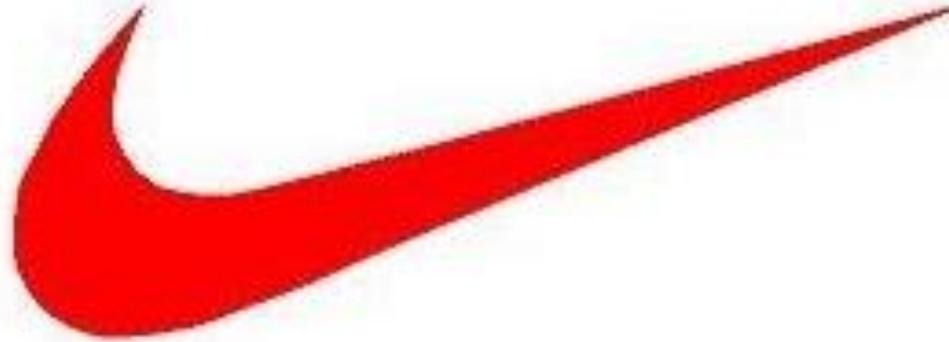
Potential programme deliverables

- Does it deliver strategic objectives?

SCOPE		IDEA 1	IDEA 2	IDEA 3
DESIARABILITY	Do users want it?			
FEASIBILITY	Can we deliver it?			
VIABILITY	Can we fund it?			



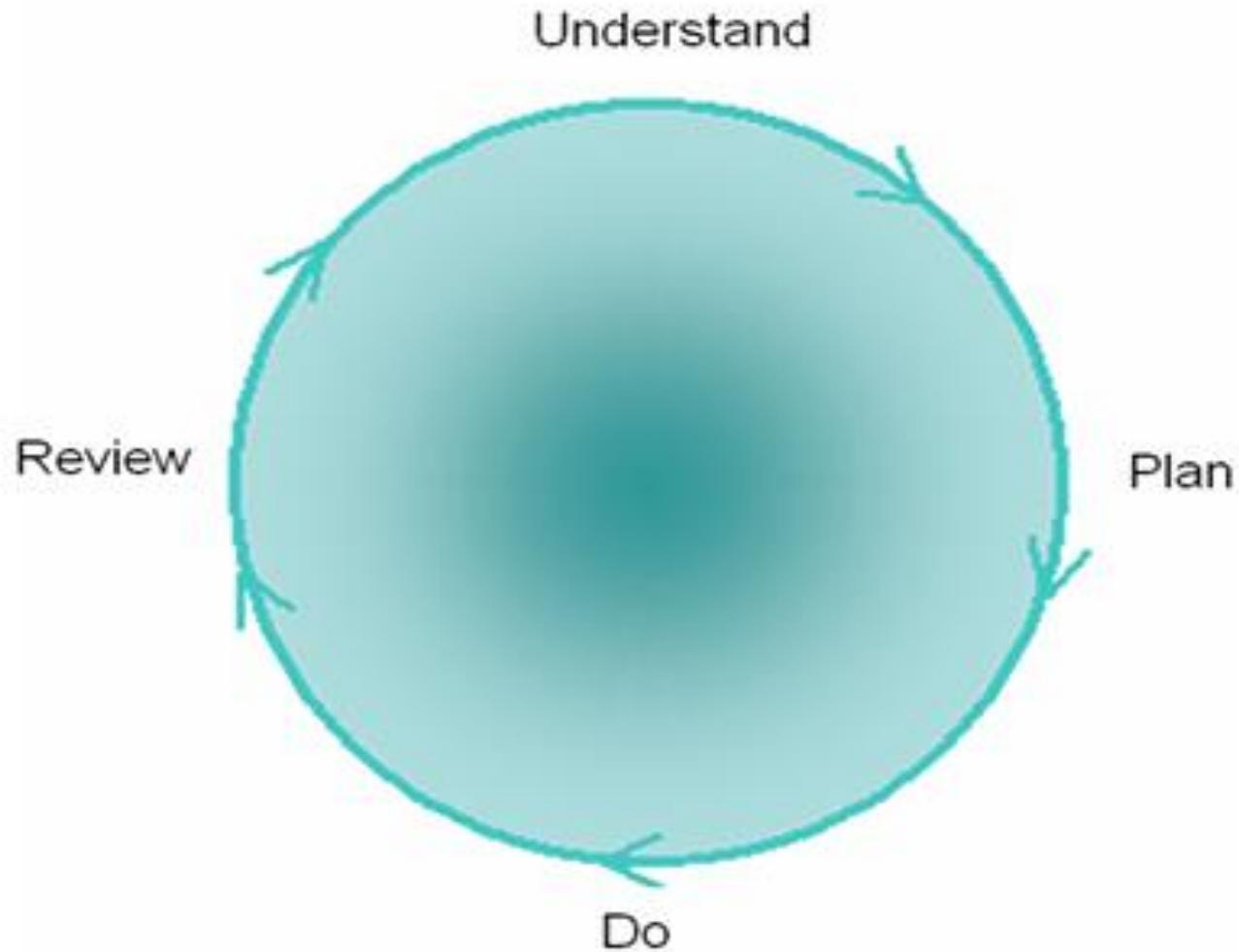
4. Act: Start



... even if it's small



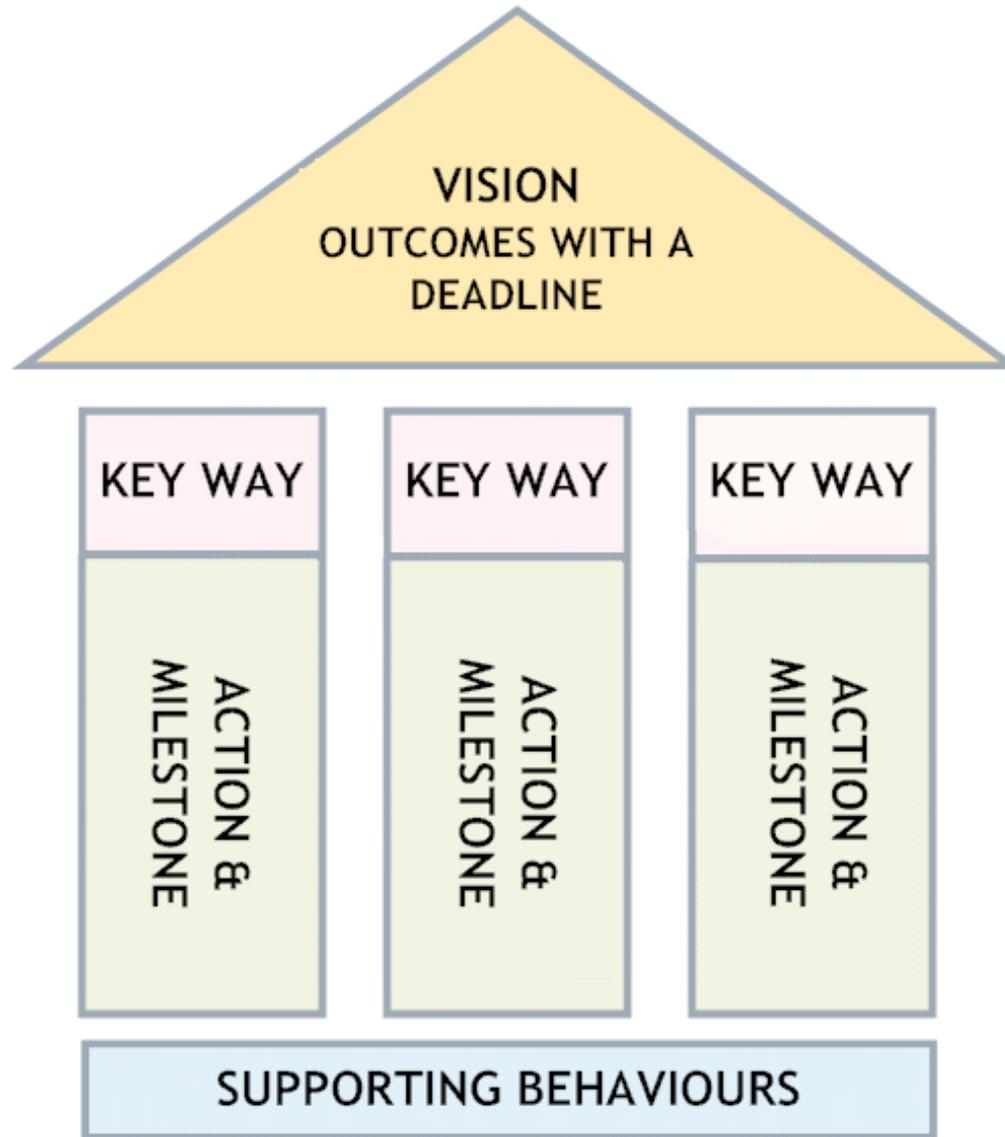
Piloting delivery



<https://redochre.org.uk/wp-content/uploads/2012/03/SE-Understand-plan-do-review-strategic-tool-pdf.pdf>



5. Advance: Delivering change



Measuring & Reporting

- Know what you want to change
- What is your starting point – benchmark
- What does the end process look like?
- What are the step changes
- How will you know you are getting there
- How will you measure this
- How will you report this
- Who needs to be reported to
- What do they want to “hear”
 - Build this into your strategy

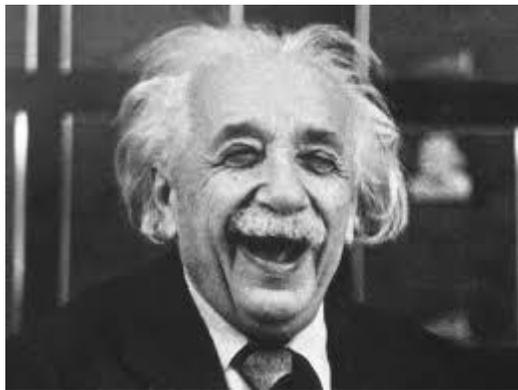


Performance / impact management

- Messen ist wissen (To measure is to know)



Werner von Siemens



- Not everything that can be counted counts, and not everything that counts can be counted

Albert Einstein



What's in a business plan?

Capacity
Procedure Change
Relationships Direction
Leadership Action
Tactics Cost People
Strategy Impact
Values Investment Value
Plan Vision Users Risk
Revenues
Resources Impact
Process Beneficiaries
Skills



Business Plan – writing down the plan

- Reference for actions over a time frame
- Resource and capability identification
- A way to create credibility
- Inspire confidence
- Convince reader that risk is minimal
- Excite the reader
- Inspire the reader to take action
- Convince association benefit

} Internal

} External



Tips & Tricks

- You are telling a story
 - Nobody likes boring stories
- People are lazy
 - They don't like reading long documents
 - Not more than 20 pages
 - Rest of information can be in annexe
- Usually a decision is made just from reading the executive summary
- This is the most important part of the document



Structure

- Executive Summary
 - Always at front but written last
 - Summarises the document
- What you want to do/ value proposition
- Legal information
- Marketing information
- Management & Governance
- Operational information
- Financials
- Appendices



Appendices

- Financial forecasts
- Assumptions
- Management resumes
- Market research
- Stakeholder/ customer references/ praise
- Marketing material
- Anything that will help your cause



Next Steps



helping you
to help others

Feedback

<https://www.surveymonkey.com/r/HG7J7F2>

DSC Publication

List any relevant DSC publications here and/or leave the link

Available at DSC www.dsc.org.uk/publications

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or otherwise, please contact

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DSC Information and Resources

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Focus and using limited resources ...

