Slide 1

all Chicago

Sustainable Strategy Program
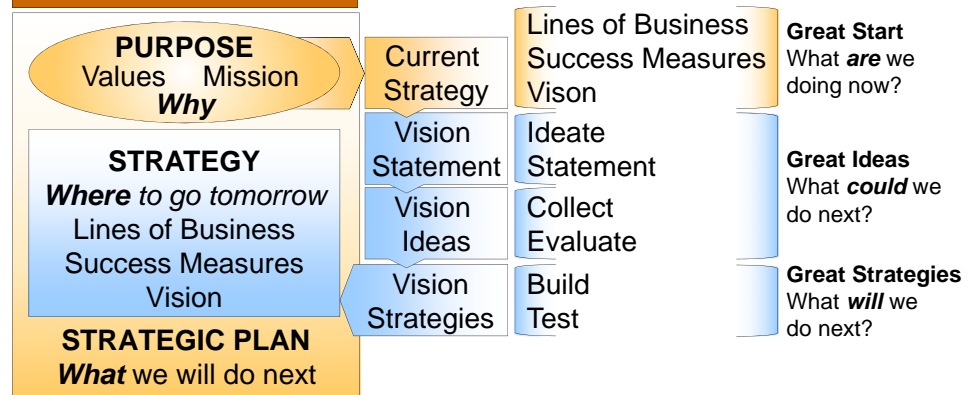## Great Ideas

STRATEGY
Where to go tomorrow?

PURPOSE
Why?

Slide 2

10/9:40-1

SESSION 1

STRATEGY
Where to go tomorrow?
PURPOSE
Why?

Announcements
Q & A

SSP MODEL

PURPOSE
Values   Mission
Why

STRATEGY
Where to go tomorrow
Lines of Business
Success Measures
Vision

STRATEGIC PLAN
What we will do next

Current Strategy

Vision Statement

Vision Ideas

Vision Strategies

Lines of Business
Success Measures
Vison

Ideate
Statement

Collect
Evaluate

Build
Test

Great Start
What *are* we doing now?

Great Ideas
What *could* we do next?

Great Strategies
What *will* we do next?

Slide 3

20/10:15-1

Vision Statement   ▪ Ideate

Many paths
-
-
-
-

▪ Let it simmer
  ▫ "Strategy making is an immensely _____ process, which involves the most

  and at times,

  (Mintzberg, 1994, p. 111)

Slide 4

15/9:55-1

Clear Vision A   pointing the way. Burt Nanus

A shared picture of the   . Peter Senge

Mission =

Vision =

Defined

Types

Elements

▪ Clear, but broad-stroke picture of the future
▪ Bring statement to life
▪ Achieve the strategies

Vision Statement ▪ Ideate ▪ Stakeholders

Why bother?
- ▪ "If you make today's customer happy, they'll stay with you and will
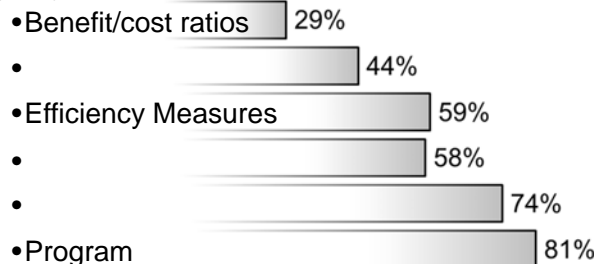 (Majeska, 2001)
- ▪ "excellent companies *really are* to their customer."
  (Peters and Waterman, 1982, p. 156)
- ▪ How NPOs get to know their stakeholders
  (Salamon, Geller and Mengel, 2010, p. 11)

1971

__ to acquire new customer
__ to keep that customer
Street Authority Daily, 2/21/13, Customer Retention

- •Benefit/cost ratios — 29%
- • — 44%
- •Efficiency Measures — 59%
- • — 58%
- • — 74%
- •Program — 81%

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Stakeholder Analysis

"any person, group, or organization that can _____ attention, resources, or output . . . or is _____ by that output."
(Bryson, 1995, p. 27)

▪ are the stakeholders ( )?
- ▪ How much do they have?
- ▪ How much do they have?
- ▪ What do these stakeholders ?
(From Bolman & Deal, 2013, pp. 211-212)

- ▪ How to
  Majeska (2001)

Ask me
Existing Info • Google, etc. • census.gov
Observe • Effective • Cheap • Observing, counting
Survey • Can you spell surveymonkey.com • Looks simple, but is an art.
Focus Groups • Get a group of 8-10 together • Ask them questions
Test Market • Give them the • Ask why they • Ask why they

•What do you
•What you like?
•What you like?
•What should I have

Get to know me *better*

- ▪ And then

BREAK STRATEGY Where to go tomorrow? PURPOSE Why?

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Vision Statement ▪ Ideate ▪ Stakeholders ▪ BOBs

Great Artists

Best of best in your field
- ▪ Three reasons
  - □ Find "those characteristics that are essential to successful performance
    (Oster, 1995, p. 42)
  - □ Assess your
  - □ *The* source of
    (Bhide, 1994)
- ▪ Finding BOBs

Experts Opinion

Survivor Technique

- ▪ Ask experts
- ▪ Ask funders
- ▪ Ask the
- ▪ Find market survivors
  Charity Navigator
  GuideStar
  National Center for Charitable Stats

lucky breaks
Swept up
Found through orderly research for opportunities
- • no plan
- • simple
- • financials
- • full plan
Replicated, modified an idea found

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How to know your BOBs
- ▪ What you're looking for
- ▪ Method 1 –
- ▪ Method 2 –
  (From Hitt et al., 2011)

ADMIT ONE Admission Price Comparison IDEAS

What you're looking for

Best of the Best		
Your Agency	BOB 1	BOB 2
Lines of Business		
Financials		
Revenue xxx,xxx,xxx	xxx,xxx,xxx	xxx,xxx,xxx
Expenses xxx, xxx,xxx	xxx,xxx,xxx	xxx,xxx,xxx
Net Revenue xxx,xxx,xxx	xxx,xxx,xxx	xxx,xxx,xxx
Net Assets xxx,xxx,xxx	xxx,xxx,xxx	xxx,xxx,xxx
We have, they don't	They have, we don't	They have, we don't

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Vision Statement — Ideate — Stakeholders — BOBs — Stop Fix

Stop Fix
- Step 1 – Get all your LOBs on the table
- Step 2 – Decide what to stop or fix

Why social enterprise ideas don't go
- ____ percent can't move their ideas forward
  - Lack of
  - Growth capital availability
  - Narrowness of government funding streams
  - Foundations encourage innovation but .
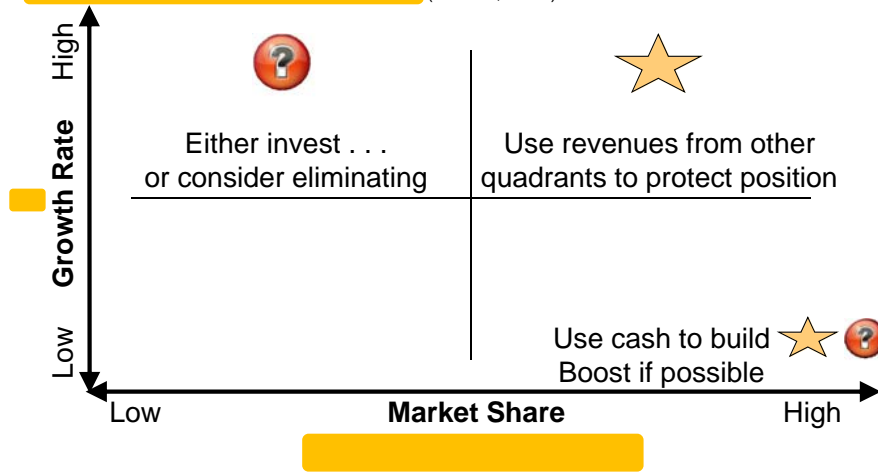 (Salamon, Geller and Mengel, 2010, p. 7)
- What to do about it
  - Enter Portfolio Analysis
  (Kearns, 2000)

The essence of strategy is choosing
(Porter, 1996, p. 70)

Boston Consulting Group Model (Abbreviated from Hedley, 1977)
NPO Double Bottom Line (Kearns, 2000)

Growth Rate (High / Low) vs Market Share (Low / High)

- Either invest . . . or consider eliminating
- Use revenues from other quadrants to protect position
- Use cash to build. Boost if possible

MacMillan Product Matrix
(Adapted from MacMillan, 1983, pp. 65-68)

- Use all *current* LOBs
- Decide what to:
  - Stop
  - Fix

Location and logistics
Stakeholder loyalty
Track record
Market share
Momentum
Quality
Fundraising capacity
Advocacy
Technical skills
Organizational skills
Local contacts
Research skills
Communication skills
Cost effectiveness

Mission congruence
Builds on strengths
Shares overhead

Support appeal
Fundability
Market size
Growth rate
Measurability
Prevention vs. cure
Exit barriers
Client resistance

Step 1

	High		Low	

Step 2

	High	**Low**	**High**	**Low**
Step 3 **Strong**	Aggressive Competition	Aggressive Growth	Build Up Best Competitor	Soul of the Agency
Weak	Aggressive Divestment	Build Strength or Sell out	Orderly Divestment	Foreign Aid Joint Venture

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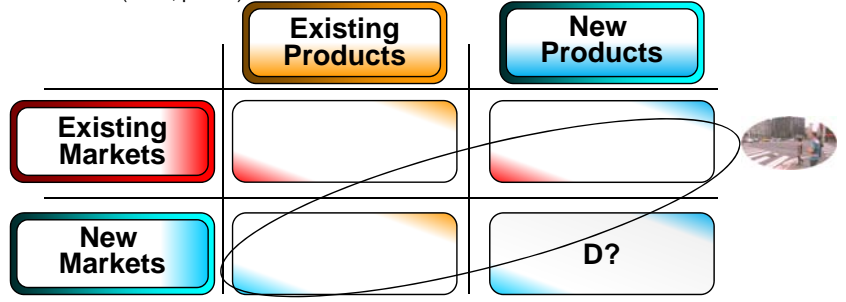**SESSION 2** — STRATEGY Where to go tomorrow? — PURPOSE Why? — **PURPOSE PITCHES**

Vision Statement — Ideate — Stakeholders — BOBs — Stop Fix — Great Qs

Schumpeter Five
(in Dees, 02001, p. 163)

- A
- service, or program
- The most common approach
- A
- Typically how something is made or sold
- A , serving an unmet need
- Geographical, demographical
- A
- A
- Typically restructurings – mergers, etc.
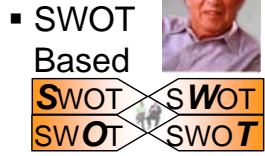
Ansoff Four (1957, p. 113)

	Existing Products	**New Products**
Existing Markets		
New Markets		**D?**

- Case in point (Kim & Mauborgne, 2004)

Line Extensions: 86% - 62% - 39% New Lines: 14% - 38% - 61%
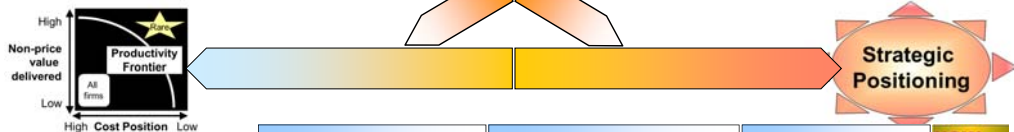

Drucker Two

- SWOT Based

SWOT S**W**OT
SW**O**T SWO**T**
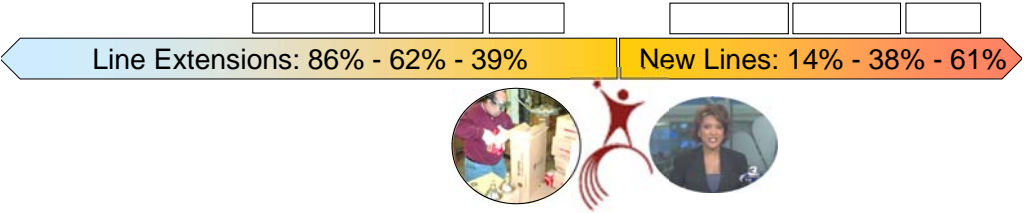
"genuinely entrepreneurial businesses have two 'first pages'

–and managers spend
" (Drucker, 2002, p. 68)

- Two Questions

High
Non-price value delivered
Low
Productivity Frontier
All firms
High Cost Position Low

Strategic Positioning

- BAM it Brainstorming | Affinity-grouping | Multi-voting HOW TO CREATE

Focus on quantity	1 Individual: brainstorm
Withhold criticism	2 Group: brainstorm
Welcome unusual ideas	3 Group: affinity group
Combine & improve ideas	4 Individual: decide (3,2,1)
	5 Group: decide

- URTurn

BREAK STRATEGY Where to go tomorrow? PURPOSE Why?

Vision Statement — - Ideate - Statement

Make your Vision Statement, which is the

Vision "depends on an ability to _____"
(Mintzberg, 1994, p. 270)

- First, look for themes in your ideas
- Second, BAM it
  - In three years, our agency will be . . .
  - The difference between our agency today and three years from now is . . .
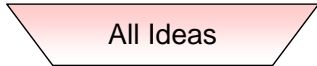- Third, make it
  - KISS @ ≤
  -
- Fourth, test it

- Does it stimulate
- Does it create momentum?
- Does it get people going?
- Does it get people's juices flowing?
- Do they find it

- Are they willing to throw their creative talents and _____into it?
(Collins & Porras, 1994, pp. 95-96)

Vision Ideas — Collect Evaluate

Step 1 – All Ideas All Ideas
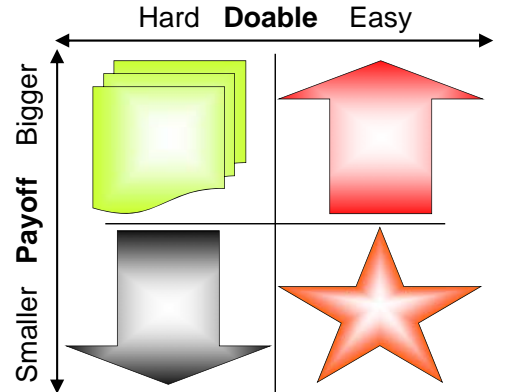Step 2 – First Cut
- Intuition (Blink, Gladwell, 2005)
  - Decisions made very quickly can be every bit as good as decisions made
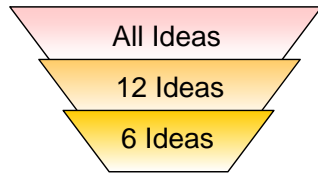   " (p. 14)

12 Ideas

Step 3 – Contenders
- Pay-off Matrix
(Ulrich, Kerr, Ashkenas, The GE Workout, 2002, p. 137)

6 Ideas

Hard **Doable** Easy

Bigger
Payoff
Smaller

Vision Ideas

- Collect
- Evaluate

(Funnel: All Ideas → 12 Ideas → 6 Ideas)

Finalists

- Decision Matrix

Criteria	WT	Finalists					
		A New Home	Student Matinees	Increase PR	Cut LOBs	Admin. Volunteer Program	Historical Holiday Festival
	5	20	15	15	25	5	25
	5	25	25	25	5	10	25
	4	4	20	4	12	4	20
Profitable	3	15	9	12	15	15	15
Fundable	4	20	20	4	4	4	20
Achievable	3	12	12	12	15	12	12
Total		96	101	72	76	50	117
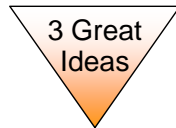
3 Great Ideas

Great Ideas Presentations

One: Connect emotionally

Two: Script it (< 6 minutes)

SETUP	CONFRONTATION	CONCLUSION
Introduce the "characters" often in the context of a personal story. Set audience expectations about what they'll get out of the presentation and why they should care.	Detail the problem (villain) and eventually, the solution (or hero) with data, examples, and support point.	Share a story or message of hope, and leave the audience with a clear call to action or "rallying cry."
	What's the problem? What could we do next?	*What will we do?*
What are we doing now?		

Great Start

PURPOSE
Values Mission
Why

Great Ideas

Vision Statement | Vision Ideas

(Funnel: 24+ Ideas → 12 Ideas → 6 Ideas → 3 Ideas)

Three: Coaching

Four: Practice

Five: Do it!