

5 STEPS TO STRATEGIC ACTION

Included: Steps, Definitions, Questions to Ask, and a Flow Chart

Step One: The Mission, Vision, and Values of the organization must be clear, shared, and communicated with, and understood by, everyone on the staff and with appropriate others outside (Board members, key stakeholders, etc.). Revisiting all three statements is essential even if they are validated. If necessary, create new ones so the foundation is in place FIRST.

Step Two: Test your current Vision. For a vision to be effective over time, it must be inspiring, clear, credible, and create a strong commitment in everyone guided by it. Always test your vision to see if it meets those criteria well enough to be the overarching, driving force that a great vision needs to be.

Step Three: Identify those significant few strategies that are **aligned** with your mission, in harmony with your values, and most **effectively advance your vision**. In doing so, it is important to engage all those whose input will both provide them a voice, and inform the strategies chosen by your leadership team.

Step Four: Action Plan the Strategies!! Once the strategies are established, **ownership** and accountability for each strategy, and engagement of the key stakeholders, must be determined and action plans put into place with deliverables and time lines. Communication across the organization is an essential part of this step.

Step Five: Action Plan the Tactics!! Determine what specific actions will ensure the Strategies are accomplished with **high quality, on time, and on budget**. This work is led internally by those accountable for the execution of the Strategies and most of this work is accomplished by those closest to the actual work – individually and on teams.

Pay attention to both the head and heart of this process, making sure reality is balanced with emotions to achieve the best results.

DEFINITIONS OF MISSION, VISION, VALUES, STRATEGIES, AND TACTICS

Mission, Vision, and Values are essential for the foundation of all great organizations

- Mission:** is our purpose – why we exist, do business, what we do exactly.
- Vision:** is our passionate dream for the future; we're not there yet, and we are committed to getting there.
- Values:** are our promises – how we will conduct ourselves while executing our mission and advancing toward our vision.
- Strategy:** is our focus – those significant few things to measurably advance us toward our vision.
- Tactics:** are those things that will ensure our strategies are achieved.

And...

It IS the leaders' job to establish the mission and vision. Values should be developed with input and buy in from those who must live by them.

A vision is only a true vision when it has longevity, is not person dependent, and can stand the test of time.

Organizations need a FEW SIGNIFICANT and CLEAR, MEASUREABLE strategies to help advance the larger Vision to desired outcomes – 3-5 years out.

QUESTIONS TO ANSWER

1. **Mission** – the organization’s core work; reason/purpose for being
 - Why does this organization exist?
 - Whom does it serve?
 - What distinguishes it from other organizations
 - What do you do that gives the organization meaning?
2. **Vision** – an inspiring, passionate, image of what the organization needs to and will become; a mental, even visual, model of the future; what success looks like.
 - What kind of organization do you want to become?
 - What legacy do you want to leave?
 - How do you want to be perceived in the world? Be known for?
 - What does your ideal world look like?
 - What’s organizational culture do you want to create and how do you expect that culture will help you achieve your vision and strategic goals?
3. **Values** – the behaviors and actions that create the culture in the organization, the beliefs that drive decisions about people and work
 - What are the principles that guide your decision-making?
 - What can your stakeholders rely on in terms of the quality of programs/services/products delivered?
 - What do you stand for and how do you show that to each other?

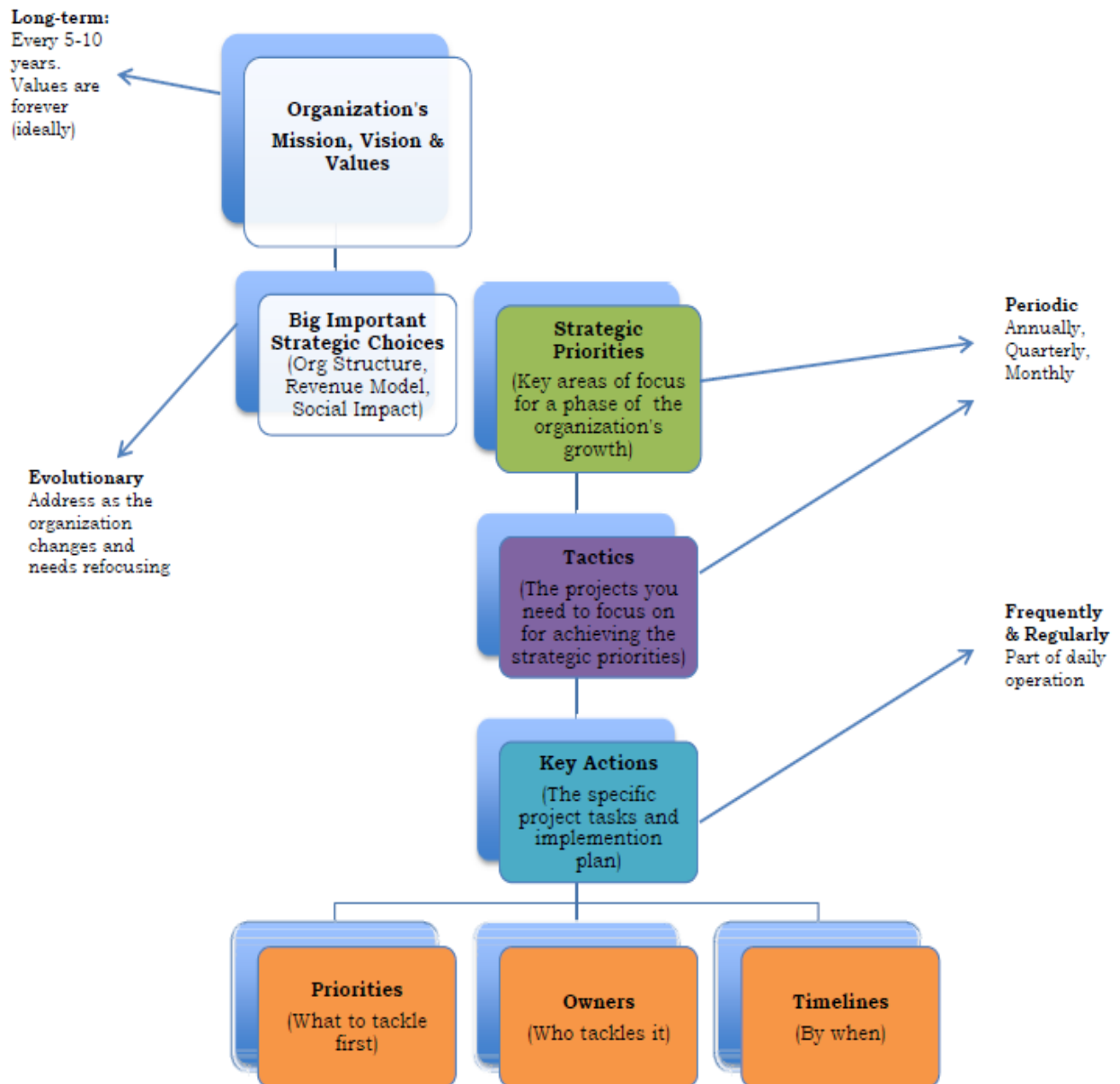
When MVV are established and clear, you can begin to align people and work in significant and meaningful ways. Everything you do should align with your Mission, advance you toward your Vision, and be carried out in harmony with your Values.

4. **Strategies** – These **FEW BIG** things will define how the organization will get where it wants to go. The overarching approach that will significantly advance the Vision and stay true to the Mission and Values.
5. **Tactics** – Those actions/activities/work, that when accomplished, will align with and advance the Strategies
 - What are the specific areas of work you want to address?
 - What do you want to have completed and by when in these various areas?
 - How will your goals advance your desired strategic outcomes?

Objectives – Fall within the Tactics. This is the work **each person’s** can identify with personally and can link to the organizational strategy, vision and mission.

- What specifically is the work that will advance the strategy and tactics?
- Who are the right people to have this objective on their “plate?”
- Who’s responsible for making it happen?
- What are the deliverables, milestones, and time lines?
- What resources (people, time, money, space, other?) are required to make this happen and happen well?
- What processes need to be in place (i.e. project mgmt, change process, structure) to ensure a positive outcome

A STRATEGIC PROCESS FLOW



Process Flow Chart Developed by ILLUME PROJECTS www.illumeprojects.com
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