



GrowthZone.com



## "How to Develop a Successful Long-Range Strategy"

1 CAE CREDIT

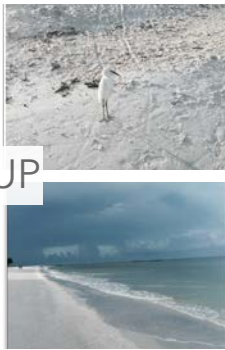
**LIVE WEBINAR**  
with Melynn Sight

Thur., April 29<sup>th</sup> 10<sup>PT</sup>/1<sup>ET</sup>





LOOK UP



## Retention | recruitment | growth



## What is Strategy?



## What is Strategy?

### Corporate Strategy

### Business Strategy

### Functional Strategy





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## The Good Stuff



Today, you're going to create some stuff. Today, you're going to sell some stuff.  
Today, your competitors are going to create some stuff and sell some stuff.

The only true opportunity you have to **differentiate** your stuff from their stuff is to promise, then provide your customers with a better experience.

And the only way to get your customers to come back to you next time to buy more stuff or to tell their friends about your stuff, is to get them to **remember** you.

So if your stuff and your competitor's stuff is pretty much the same, then you better get your "stuff" together and figure out how to make your experience remarkable.

*Therein lies the good stuff.*

- Sam Meers -

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## Strategy

- Vision
- What success looks like
- Solve big issues
- Unified* direction
- BIG concrete decisions
- Common agenda
- Proactive - Long-term
- Meaningful Priorities
- Tied to something big
- Make hard decisions
- "What"



## Planning

- Purpose
- Steps on the map
- Update
- What to do
- Who will do what
- Actions
- Tactics
- Implementation
- Means to the end
- Flexible
- Operational
- "How"

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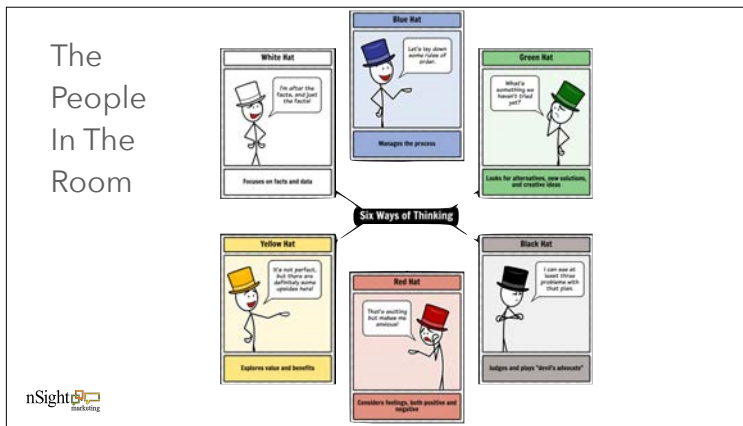
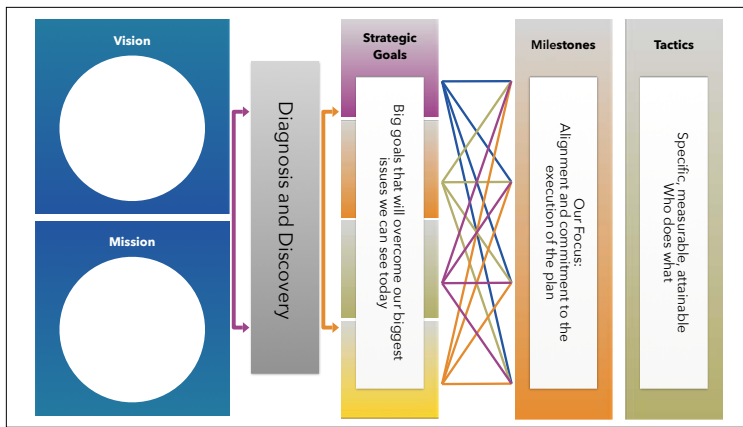
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- Demographics
- Practice
- Experience
- Specialty
- Location



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VISION  
**ASPIRATION...**  
In the perfect world,  
what will  
we *BE*?

MISSION  
**PURPOSE...**  
Today, what do  
we *DO*?



Foundation  
of a  
Strategy

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If you only focus on the **problems**,  
You will solve the **problems**.

If you focus on the **possibilities**...

Aspiration | Shared Vision

Foundation  
of a  
Strategy

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*I want my association to stand for something bigger than me.*

*Something bigger than the sum of its parts. Something others will gladly grab the flag and carry forward for decades and centuries to come.*

*I want my association to have dreams, not just plans.*

- Brad N., Association President -

nSight marketing

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As You Read Your Vision:

Your Turn



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Vision

- Ten years out
- Aspiration
- Knock it out of the park?
  - Beacon
  - RISK
  - Not your Mission

Think of your vision as a

**DESTINATION POSTCARD**



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Decide What Needs To Change

Define Issues

RESEARCH

| Biggest worry   | What they need   |
|---|--|
| • Lack of vision/strategy<br>• Poor financial management<br>• Lack of communication<br>• Lack of leadership<br>• Lack of innovation<br>• Lack of talent<br>• Lack of resources<br>• Lack of time<br>• Lack of information | • Clear vision/strategy<br>• Strong financial management<br>• Effective communication<br>• Strong leadership<br>• Innovation<br>• Talent<br>• Resources<br>• Time<br>• Information |

- Assumptions**
- Society
  - Politics
  - Competition
  - Technology
  - Economics
  - Industry

SWOT

| Helpful<br>To achieving the vision                       | Harmful<br>To achieving the vision |
|--|------------------------------------|
| Strengths  | Weaknesses                         |
| ---Industry & Market Forces<br>Trends Outside the Assn-- | Opportunities<br>Threats           |

SOAR

| Target | Current | Desired | Gap  |
|--------|---------|---------|------|
| 100%   | 100%    | 100%    | 100% |

"Success isn't possible without getting the big ideas right."

- General David Petraus

Prioritize the top issues or opportunities to pay attention to

Validate Issues

| Helpful To Moving Closer to Your Vision   | Harmful To Reaching Your Vision  |
|---|--|
| Strengths   | Gaps/Weak Links  |
| • Communication, trust, peer networking (5)<br>• In-person meetings/conferences (3)<br>• Culture of people at top of the organization<br>• Staff and effectiveness of leadership<br>• Being member driven<br>• Financial stability/respect in the industry<br>• Monitor the industry and not allow big businesses like Costco to take over<br>• Relationships of top level leaders<br>• <i>Can we avoid advice on company rights?</i><br>• <i>NO?</i> | • Turnover in staff<br>• Monitor focus on education and competency of leaders<br>• Lack of physical meetings where you can talk and associate<br>• Complacency - not looking to bring in new ideas, tech, speakers, presenters<br>• Becoming misused<br>• Leadership and administration functioning without including membership (not current team, past team)<br>• Poor management<br>• <i>Local control - Advantages?</i><br>• <i>Continued membership growth?</i> |

| Helpful To Moving Closer to Your Vision   | Harmful To Reaching Your Vision  |
|---|--|
| Opportunities   | Threats  |
| • Education - Support through access to reach day to day operations, to help them learn and then learn (3)<br>• Continued focus on social and other to build on region<br>• Get you on top level leaders to affect membership fees, maybe at the time for a new membership<br>• Result more local membership include<br>• Local other - could other potential data that can be broken down - past regional engineers<br>• A - needs to work with local member group, both and healthy for - 100%<br>• Regional membership growth<br>• Potential alliances with other chapters and big idea from strategy, not just money growth<br>• <i>Strongly with other strong vision organization?</i><br>• <i>NO?</i> | • <i>Market economy decline (5)</i><br>• Lack of resources to build and other, competition looking to provide what we want providing nothing but can't due to lack of resources<br>• Competition in knowledge from membership could continue to include<br>• <i>The members in the local group to continue without the knowledge, abilities and skills</i> |

Vision

<City> does not make a decision without <our organization> at the table.

Mission

We promote our members' success and advocate for the <>> industry.

<Name> Strategic Goals

Top Strategic Issues/Oppty

2024 Goals

|   |
|---|
| Members don't understand the value of our organization, making it difficult to engage with them and develop leaders to step up. |
|   |
|   |
|   |

|   |
|---|
| <Organization> will discover and develop a relevant value proposition to guide all member communications. |
|   |
|   |
|   |

## The Plan

### Monitor The Plan

## Implement

**THE QUICKER  
YOU LET GO OF  
OLD CHEESE,  
THE SOONER YOU  
FIND**

### Who Moved My Cheese?

## 2. Share with your stakeholders



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In a poll of >23,000 employees in key industries and employed in key functional areas reveals that:

- 37% of employees don't understand their organizations goals,
- Only 1 in 5 saw a clear connection between their tasks and their organization's goals.

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## 3. Two reasons strategic plans fail:

Implement

1. \_\_\_\_\_
2. \_\_\_\_\_

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You **can't connect the dots** looking forward;  
you can only **connect** them looking backwards.  
So you have to trust that the **dots** will somehow **connect** in your future.  
You have to trust in something – your gut, destiny, life, karma, whatever.

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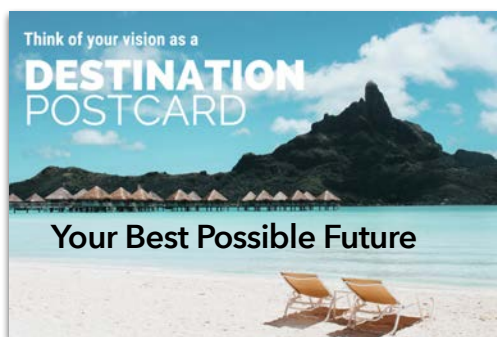
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## Strategy

In the  
End

- ✓ Unify on the big issues
- ✓ Put your energy / \$ into your plan
- ✓ What gets measures gets done
- ✓ Eye on your vision



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marketing

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