

**2014 CCSA Annual Conference:
Making Strategy Real: Worksheet & Commitment Plan**

1) Are you ready, willing, and able to take on strategic business planning?

	Rate yourself on a scale of 1 to 5 (5=highest)	What will you do to increase this score?
<p>How <i>ready</i> are you to take on planning?</p> <ul style="list-style-type: none"> → Clarity of current situation → Clarity of purpose → Passion, courage and commitment → Prepared to accept measured risk 		
<p>Are you <i>willing</i> to take on planning?</p> <ul style="list-style-type: none"> → Vision and core values facilitate process → Willingness to tackle tough questions → Willingness to commit time & resources 		
<p>Are you <i>able</i> to support planning?</p> <ul style="list-style-type: none"> → Appropriate governance → Clear “champions” → Right team → Other resources 		

2) What do you need to do to better answer how ready, willing, and able you are for a strategic business planning process?

Commitment Plan: In the next 72 hours (by Friday), I will ...

1. Take these actions:

- _____
- _____
- _____

(For example: email my Board chair; talk to a funder; write down 3 strategic questions we must answer; talk to my leadership team)

2. Call or email my accountability partner from this session (have your partner write in contact information below):

Name: _____

Email: _____

Resource For You Moving Forward

As you move forward with planning efforts, keep in mind key questions an effective strategic business plan should answer:

I. Discovery & Direction Setting:

1. How is your organization doing today?
2. How is the world different because of your efforts?
3. Are you ready, willing, and able to take on meaningful change?

II. Strategy Formation & Scenarios

1. What are the 3 to 4 things you must do well to be successful?
2. What does it cost (human and financial resources)?
3. How do you sustain it?
4. What scenario will you pursue?

III. Action Planning

1. How do you get there and make it real?
2. How do you keep yourself on track with the right measures?

IV. Throughout the process

1. Are you engaging the *right* stakeholders? Who needs to be involved?
2. What is the *appropriate level* of stakeholder engagement?

Tips for Working with Consultants

- **Be clear of what you need, but also keep an open mind**
 - Clarify what you hope to achieve, to identify the ideal end-result; but also recognize consultants may help identify overlooked needs
- **The right fit is critical**
 - Consultants wear different hats and bring different strengths:
 - Some are process-oriented (strong facilitators; project management)
 - Some are content-oriented (specific content expertise)
 - Some do both process and content
 - Identify ideal strengths your consultant should have, which should complement your team's existing strengths
 - Request for proposals/bids can help screen for the best fit (e.g. support you need; budget; specific deliverables; relevant track record)
 - Look for a good cultural fit, as your work together will be a partnership
- **Once you start working together, continue to ensure clarity**
 - There should be ongoing clear communication over the workplan, roles, deliverables, how to best work with each other, and budget updates
- **Expect to be engaged throughout -- requires both your time and thinking**