



# How to Plan for a Disruption like THIS!?

David Wilsey  
Chief Operating Officer  
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## Welcome



### David Wilsey

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Certified Balanced Scorecard Master Professional, Strategic Management Professional (ASP), former PuMP® Consultant, and KPI Professional



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## Webinar Purpose

### This webinar does NOT cover:

- Top priorities such as how to keep your family, staff and community safe
  - Health and safety planning
  - Pandemic preparedness and emergency response
  - Social distancing practices and procedures
- “Keeping the doors open” priorities, such as operational resource management
  - Emergency HR planning and response
  - Financial planning
- Where to find toilet paper



### How to Plan for a Disruption Like THIS?!

### This webinar DOES cover:

- How to frame the conversation in a disciplined manner using basic planning principles
- The formal steps to strategic planning within the context of a major disruption

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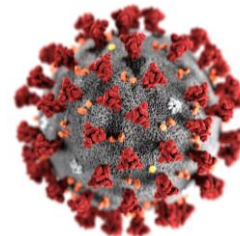


## How Many of Your Strategic Assumptions Are Now Wrong?

When you formulated your strategy, did you assume:

- The economy would remain fundamentally stable?
- Your customers/stakeholders could gather in person? Or travel?
- Your employees could gather in person? Or travel?
- Your employee parents can work all day while their kids are in school?
- Your supply chain is uninterrupted?
- Your employees/leadership would be mostly healthy?

All strategies are based on assumptions. When things change, you **have to adapt**.



**Anything else? In the Q/A box, please add any additional assumptions you might have to revisit. Or name the items above that are keeping you up at night.**

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# The Process of Planning



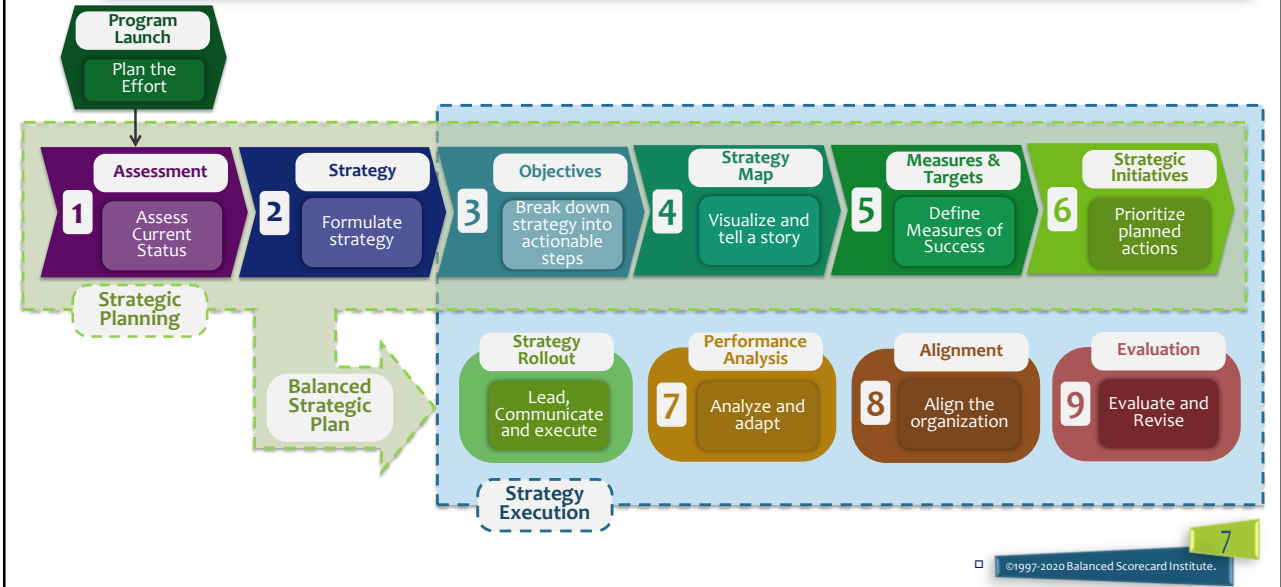
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## Strategic Planning and Management: Nine Steps To Success™



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# Nine Steps to Success™ : Strategic Planning to Strategy Execution



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## Poll – Question 1

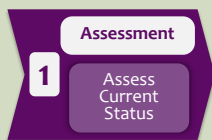
Does your organization use a formal process for strategic planning?

- Yes, we use the Nine Steps method
- Yes, we use another similar framework
- We use planning elements (mission, vision, SWOT, etc.) in an ad hoc manner
- No, we do not do formal planning yet

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- Be ready to challenge even the most basic of assumptions
- Aim for a quick 80% solution – and be ready to change again
- Trust the process
- Do your research!
- Adopt a more agile mind frame\*
  - Don't try to predict a precise future – embrace uncertainty
  - Speed up the “action/learning cadence”
- Focus on outcomes and be prepared to adapt the details quickly as needed
- Don't be married to the output of your process

\* Source: Dan Montgomery, Agile Strategies at <https://agile-strategies.com/>



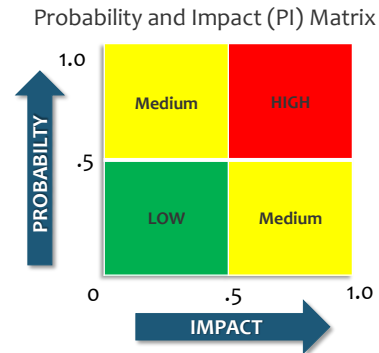
## Strategic Planning

Questions to answer:

- What does this disruption mean for us, relative to our mission, vision, values, and strategy?
- What is the internal / external context for our strategy formulation decision?
  - Use formal tools such as competitive or market analysis, surveys, SWOT, PESTLE, and other internal/external assessment tools
- Can we establish a consensus around what factors are affecting our organization?



- Personal risk parallel:
  - Some have a high health risk
  - Some have a high risk of losing their livelihoods
  - Some have a relatively low risk of either
- Organizational risk:
  - Some will shut down
  - Some hope to withstand a tough period
  - Some have a relatively low risk other than inconvenience
- Measure the impact of the risk should it occur
  - Classify risks in terms of Probability and Impact
  - Gain consensus from team members on classifications
  - Results can be illustrated in a P-I matrix and are useful for ranking risks



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### Poll – Question 2

On a scale of 1 to 10, how would you classify the pandemic risk for YOUR organization?

- |   |                         |   |
|---|-------------------------|---|
| <input type="radio"/> 1 – We will certainly shut down | <input type="radio"/> 5 | <input type="radio"/> 8   |
| <input type="radio"/> 2                               | <input type="radio"/> 6 | <input type="radio"/> 9   |
| <input type="radio"/> 3                               | <input type="radio"/> 7 | <input type="radio"/> 10 – We will almost certainly endure the current pandemic |
| <input type="radio"/> 4                               |                         |   |

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### Strategic Planning

- Building off our Assessment conversation, what is our strategy for adapting in a big picture sense?
  - What are the various scenarios we need to consider?
  - What do our customers need and what is our value proposition to them?
  - What results / goals are we trying to achieve?
  - If the disruption drives the need for a new Theme/Goal, what does success look like?
  - If the disruption is influencing various components of other strategies, what is that strategy and what does success look like?

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## What is the Value of Scenario Analysis?

- Helps address uncertainty and unpredictability
- Allows decision makers to explore possible future outcomes
- “What if” analysis that considers combinations of multiple uncertainties
- Leverage creativity and points of view from various personnel across the company without significant time commitments
- Allows for identification of “no regrets” activities that can inform investment decisions



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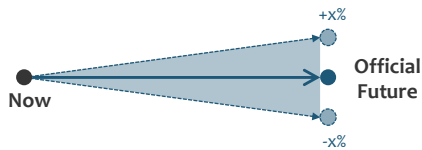
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## Scenario Analysis is NOT Forecasting

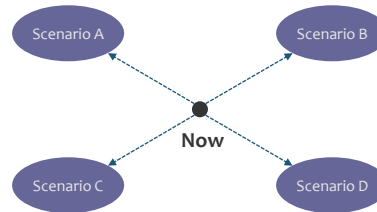
### Forecasting...

- Creates a single, official view of the future
- Limits contingencies to a narrow band of variation



### Scenario Analysis...

- Prepares the organization for multiple, divergent futures
- Identifies extremes to minimize chance of surprises



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## Strategy is Made Up of Multiple Strategic Themes – Examples

### Strategic Themes:

Main focus areas of the organization; the organization's "Pillars of Excellence", used to focus staff effort on accomplishing the vision. For each Theme there is a Strategic Result

### Strategic Result:

Desired outcome for the main focus areas of the strategy.



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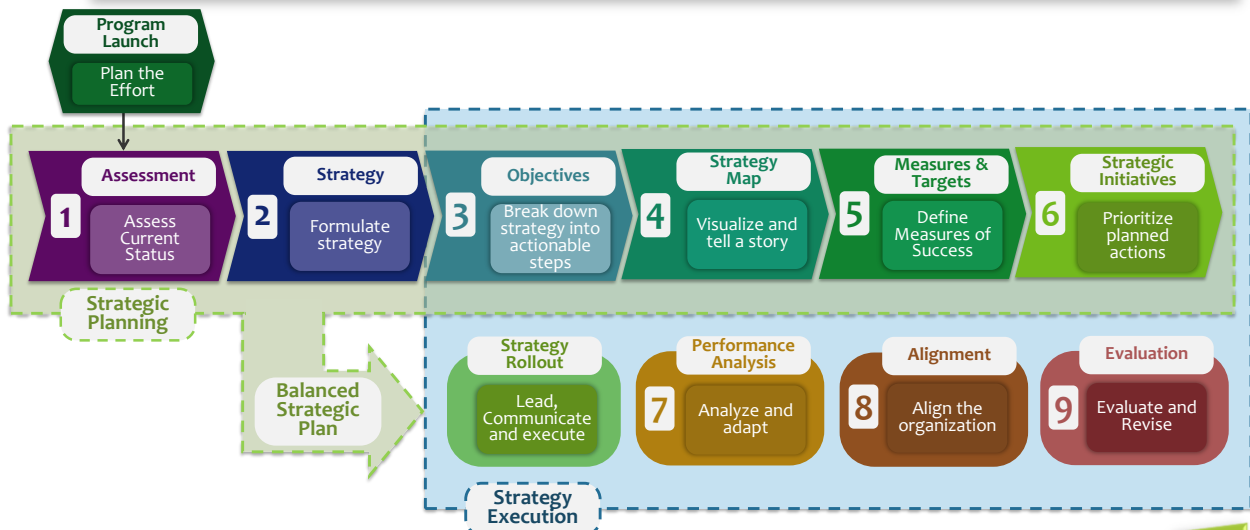
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## Possible Strategic Themes and Results Now Under Consideration

Theme: Business Continuity	Theme: Online Services
<b>Strategic Result:</b> <i>All employees and other stakeholders have the technology infrastructure, cross training, and cultural support to productively deliver a consistent level of quality services from home</i>	<b>Strategic Result:</b> <i>Our training and consulting clients engage our products and services through a diverse set of online offerings</i>

## Turn Strategy Into a System



## What is a Strategic Management System?



Communicates mission, vision, and strategy to employees and other stakeholders



Aligns day-to-day work to vision and strategy



Enables prioritization of programs, projects, services, products and resources



Uses strategic performance measures (KPIs) and targets to measure progress



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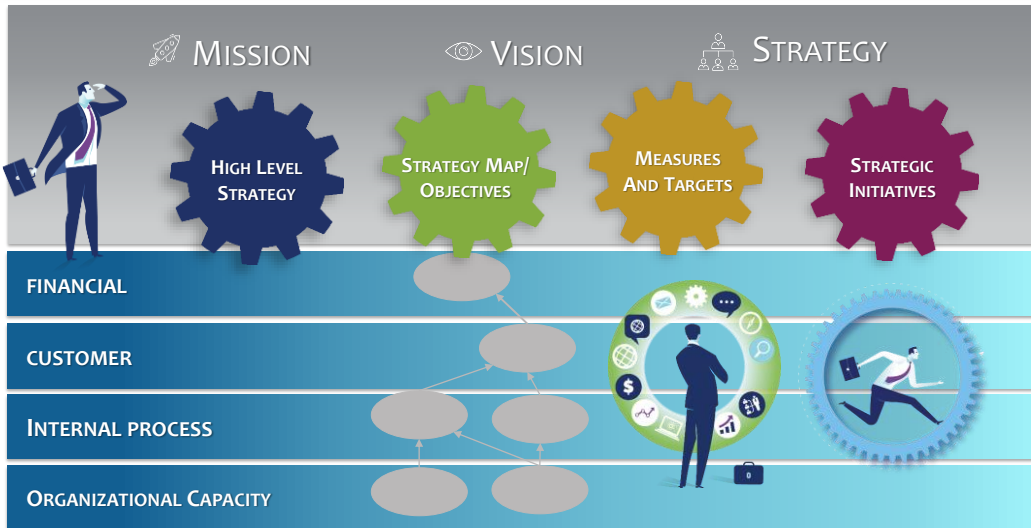
### Poll – Question 3

Does your organization use a framework for strategy management that includes measures?

- Yes, we use the Nine Steps method
- Yes, we use another similar framework
- We have measures but don't necessarily connect them to strategy
- No, we don't measure strategy in a formal sense

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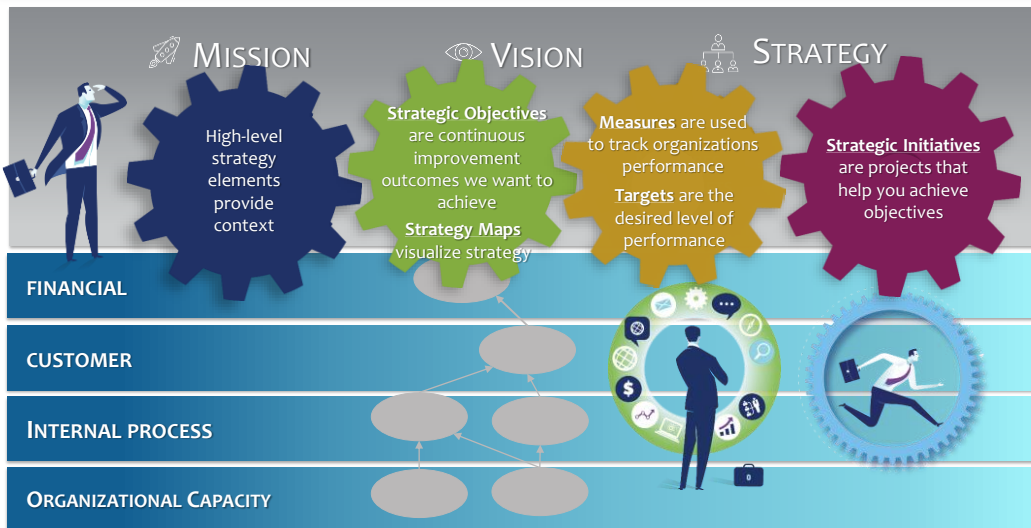
## A Strategic Management System Connects the Dots Between Strategy and Action



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## A Strategic Management System Connects the Dots Between Strategy and Action



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# Strategic Planning and Management System Example

<b>Vision:</b>	Be a world-class model for a successful urban community			
<b>Mission:</b>	Provide effective and fiscally responsible services in a manner that promotes high standards for community life			
<b>Strategic Themes:</b>	<b>Government Reform</b>	<b>Nurturing Children and Families</b>	<b>Public Safety</b>	<b>Economic Abundance</b>
<b>Strategic Results:</b>	Maintain an ethical and transparent government that engages its constituents and provides effective and efficient services.	Create a safe, thriving and engaged community so families can flourish through achievement of social, mental, physical and cultural well-being.	Create and maintain a safe, secure community-oriented city that is clean and vibrant.	Offer abundant opportunity for financial stability and advancement for all socio-economic levels.
<b>Strategic Objectives and Strategy Map</b>		<b>Measures</b>	<b>Targets</b>	<b>Initiatives</b>
Constituent/ Stakeholder		<ul style="list-style-type: none"> <li>Livability satisfaction score</li> <li>Program satisfaction score</li> <li>Per capita service utilization</li> <li>Business permits and licenses</li> <li>Per capita income</li> <li>Tourism revenue</li> </ul>	<ul style="list-style-type: none"> <li>&gt;90% this year</li> <li>&gt;85% this year</li> <li>65% this year</li> <li>↑9.5% each quarter</li> <li>↑3% this year</li> <li>↑6% this year</li> </ul>	<ul style="list-style-type: none"> <li>Green Space program</li> <li>New business startup program</li> <li>Community engage committee</li> <li>Partnering program</li> </ul>
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**Communicate Vision, Mission & Strategy**

**Communicate Strategy Map is Your Story of Value Creation**

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# Government Strategic Planning and Management System Example

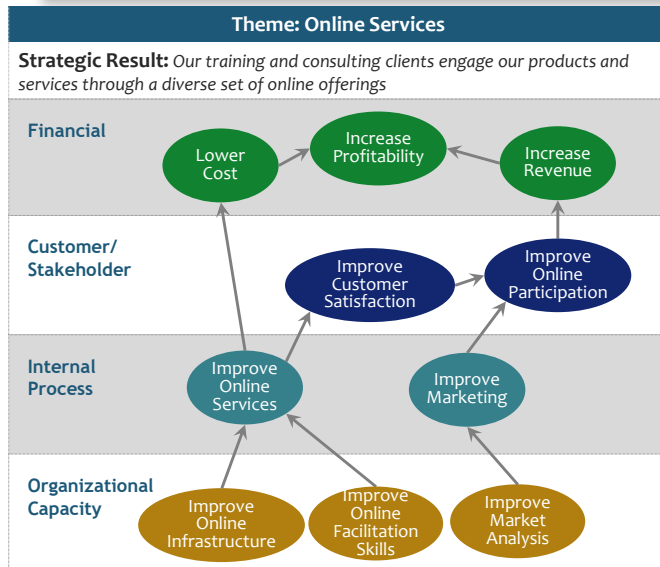
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## A Possible “Online Services” Theme Strategy Map



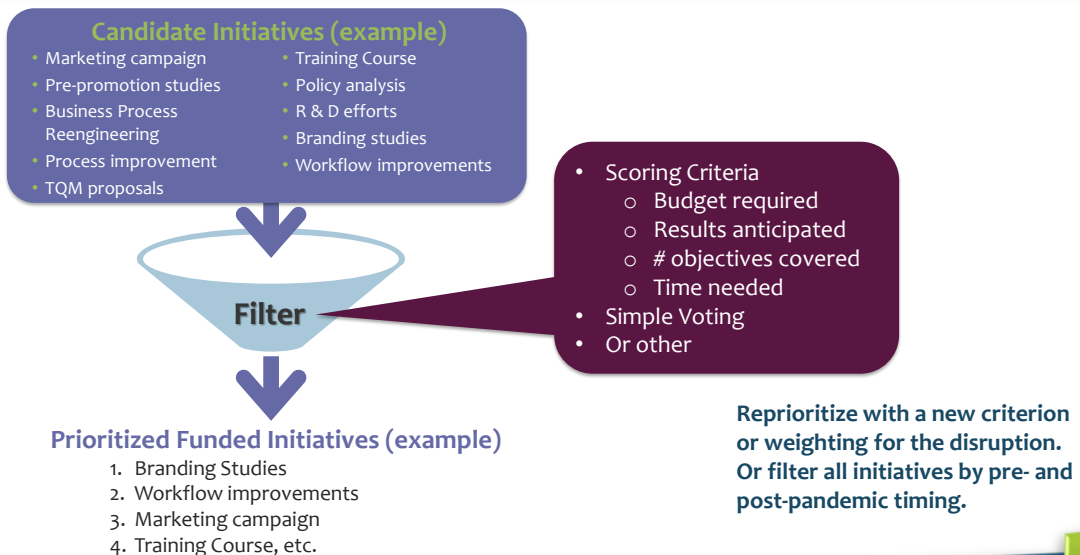
**Possible measures:**

- Revenue related to online services
- Online participation numbers
- Social media/web traffic related to online service marketing
- % of facilitators passing online skills test

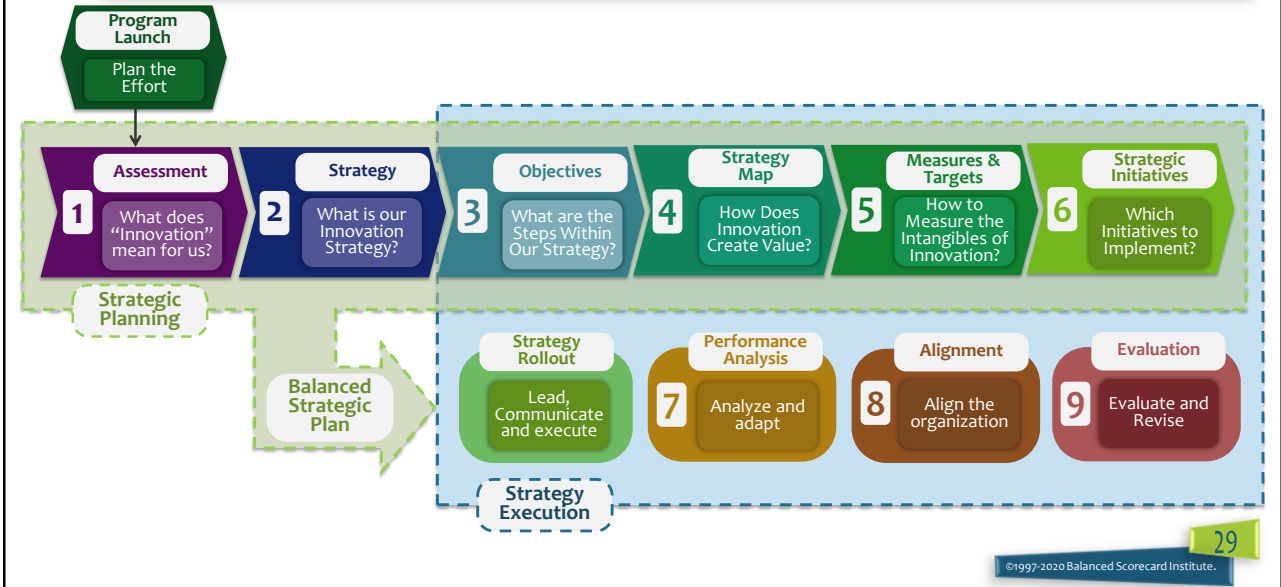
**Possible strategic initiatives:**

- Redesigning services online
- Marketing campaign
- Upgrading online infrastructure

## Reprioritize Strategic Initiatives



## Summary: Managing Strategy With the Nine Steps to Success™



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## How to Learn More

Interested in having a BSI consultant discuss your strategy with your team (scenario planning, prioritization, or the development of goals, objectives, measurements, etc.)?

- Contact: [info@strategymanage.com](mailto:info@strategymanage.com) to schedule a free 30-minute advisory consult



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## Poll – Question 4

Are you interested in learning more about our services?

- Yes, I would like to hear more about training solutions
- Yes, I would like to discuss our strategy with a consultant
- Yes, I would like to discuss both training and consulting options
- No, thank you

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Wrap Up & Questions

[www.balancedscorecard.org](http://www.balancedscorecard.org)

The diagram is a circular framework with 'Mission Vision' at the center. It is divided into four quadrants: 'CUSTOMER / MARKET' (top-left), 'INTERNAL / PROCESS' (top-right), 'FINANCIAL / STEWARDSHIP' (bottom-left), and 'ORGANIZATIONAL / CAPACITY' (bottom-right). Each quadrant is further divided into 'Objectives', 'Strategy', 'Performance Measures', and 'Initiatives'. The outer ring of the diagram is color-coded: purple for Assessment/Evaluation, orange for Alignment, green for Performance Measures, and blue for Strategy.

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