



## **Consulting Case Study #2**

### **Background**

A nonprofit organization needed to launch a newly developed 4-year strategic plan and new mission and vision statement internally to all employees. It was important to leadership to have all employees understand and embrace the mission statement and work collectively to achieve its vision.

### **Goals**

- To increase employee involvement in the 4-year strategic plan
- To create ownership and buy-in of the vision
- To help each staff member see themselves as a value added contributor to the success of the strategic plan
- To drive the implementation of the strategic plan with emphasis on growth and quality

### **Approach**

#### *Needs Assessment*

Interviews were conducted with the Director of Organizational Effectiveness and the HR Director to define scope, purpose, outcomes and level of involvement. It was determined that two approaches would be used:

- Development of Employee Shared Vision Series
  - Employee participation in linking the vision to their daily work to make it come alive and be tangible
  - Employee involvement in identifying critical success factors for realizing vision
- Development of Employee Support Activities that would maintain the momentum and keep the strategic plan relevant and active
  - Identification of actions that address progress towards the strategic plan metrics
  - Implementation of milestone events
  - Reward and recognition for specific behavior keyed to results

#### *Development*

The program utilized active learning approaches for each session that engaged the participants in exercises and real organizational setting scenarios. Activities were utilized to keep participants absorbed and energized in the sessions. To help individuals integrate and apply strategic principles, visioning tools were utilized and compression planning, a participative process tool, was utilized to gain involvement and buy-in from each staff member.



*Facilitation of leadership and staff sessions*

- Creating a shared vision (Staff Session I)
  - Creating a graphic history (lessons learned from the past and acknowledging accomplishments of the present)
  - Context mapping (creating a snapshot of the present environmental trends and forces that effect the implementation of the strategic plan)
  - Vision headlines (creating a cover story identifying with pictures how the 2010 Vision will look with their involvement)
  
- Gaining commitment (Staff Session II)
  - Creating a visual that identifies “Five Bold Steps” for realizing the vision-makes linkages to vision themes and identifies supporting and challenging factors
  - Anchoring alignment with day-to-day activities through the creation of a graphic game plan that identifies key actions with the success factors needed to achieve outcomes

*Ongoing support activities*

- Maintaining momentum
  - Identifying key events that keep the message upfront and important
  - Tying individual performance with team and organizational success, and developing a team charter
  - Integrating key focus areas in organizational meetings and communication
  - Having special events for recognition and reward of progress
  
- Pre-meetings
  - Development and refinement of strategy based on key input from stakeholders
  - Discussion of expectations
  - Finalization of approach
  
- Pre-facilitation meetings for employee sessions
  - Development and review of employee session agenda, activities and outcomes
  - Review of visioning tools and compression planning process
  
- Pre-facilitation coaching sessions for preparation of employee programs
  - Review of facilitation methodology
  - Overview of approach
  - Development of participant feedback response form
  
- Observation/facilitation support for initial pilot for process approach



- Post-event coaching
  - Post session review and debrief with revisions for process improvement
  - Coaching support
- Follow-up
  - Post-event recommendations
  - Implementation plan
  - Final meeting to overview process, observations and recommendations

### **Outcomes**

- Reinforcement of the new vision statement
- Increased effectiveness in applying the strategic plan to daily activities
- Further development of accountability to team and organizational outcomes
- Proactive understanding to address issues and barriers
- Further development of a shared culture