



My Council Plan

PLAYBOOK

My Council Plan reference guide for getting a strategic plan up and running quickly.



Introduction

Welcome to My Council Plan. Ready to drive organizational focus, clarity and alignment? This resource is for you. We've collected our best-of-the-best thinking from working with thousands of organizations and put it all into the My Council Plan Playbook –it's much more than a user's guide. It's a guide of just the essentials to deploy a strategic plan, one that is focused on managing your council strategically.

This Toolkit's Intended Outcome:

- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the My Council Plan platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Management Meetings:** Learn how to refine your existing council committee and staff meetings to be driven by your strategic performance metrics.
- **Results:** Start seeing results by focusing on what matters most and aligning your council committees to a unified direction.

What You will Need for Success:

- **Scout Executive Commitment:** A visible, consistent commitment to strategy from your council leadership.
- **Urgency:** Vigilance and dedication to keeping the process moving with unrelenting momentum.
- **A Dedicated Strategic Plan Chair:** Your council must have someone dedicated to nurturing and driving the process.
- **Agility and Flexibility:** You need to be flexible and agile to review progress and adapt the strategic plan where needed.

This is NOT a Comprehensive Overview of the Strategic Planning Process

This Playbook gets the process of managing strategically up and running quickly so you can gain momentum. However, it does not take you through the strategic planning process in its entirety. Below is a diagram illustrating the areas this Playbook covers within the entire strategic management process.

Our Strategy Management Process

Assess

Strategic Issues: Identify Strategic issues to address.

Industry & Market Data: Identify market opportunities and threats.

Customer Insights: Assess current satisfaction and future demand.

Employee Input: Determine strength and weaknesses.

SWOT: Synthesize the data into summary SWOT items.

Design

Mission: Determine your organization's core purpose.

Values: Identify your core beliefs.

Vision: Create an image of what success looks like in 3-5 years.

Competitive Advantages: Solidify your unique position.

Org. Wide Strategies: Establish the approach for how you will succeed.

Long-Term Objectives: Develop a 3-5 year balanced framework of 6 or less objectives.

Forecast: Develop a 3-year financial projection.

Build

Use SWOT: Process the SWOT to set priorities.

Organizational Goals: Set short-term SMART goals. (1+ yr.)

Team Training: Train team to use My Council Plan.

Department Goals: Cascade org goals to departments. (12 months)

Team Member Goals: Cascade dept. goals to individuals.

Budget: Align a one-year budget with the plan.

Manage

Rollout: Communicate strategy to whole organization.

Set Calendar: Establish schedule for progress reviews.

Adapt Quarterly: Hold progress reviews and modify the plan where needed.

Update Annually: Review end of year, plan next year.

OnStrategy

Do You Need A Complete Guide to Strategic Planning?



If you need a comprehensive overview of the planning process, see our Complete Guide to Strategic Planning.

Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the My Council Plan application is a dynamic, one-page strategic plan that communicates to everyone in your council what the strategic focus is and how the council is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The image below shows you what a completed, active plan will look like when you are done.

The Playbook walks you through how to build and manage a strategic plan – in just 4 steps.

Step 1: Build Your Mission and Vision

Step 2 & 3: Set Strategic Objectives and Goals

Step 4: Manage Your Council Committees

Acme Corporation

Powered by MyStrategicPlan

Plan


Performance

Reports

Dashboard

Russell P.

MANAGE CARDS

Get the Most out of 

THE ONSTRATEGY PLAYBOOK

SEE WHAT A GOOD PLAN LOOKS LIKE

Mission

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

Vision

We envision being THE technology experts and resource center for small and medium-sized organizations.

Core Values

Core Values:

- Professionalism - to be professional in our actions to our clients, partners and each other.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.

Strategic Objectives

60% 30 16 7 19

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year over year for the next 3 years while maintaining a 20% net profit margin each year.

50% On Strategy 9 9 3

Organization Goals	YTD Target	YTD Variance	Actual
1.1 1.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.2 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.3 1.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188

2. Customer Success – Professional Services: To be the professional partner of choice. 52% On Strategy 6 3 3 9

3. Customer Success – Maintenance Contracts: To be viewed as the top technology resource in the western region. 73% On Strategy 7 7

4. Internal/Ops – Innovation/Product Development: Continue to develop technology innovation. 64% On Strategy 8 4 4

Next Steps

Manage Performance

Keep your team motivated and inspired

✓ Congratulate achievers!

✓ Nudge those falling behind

Strategy Expert

Zach, your strategy expert is just a click away

CALL: 775 747 7404 EMAIL

My Focus

Flagged (3)

1.1.1 Professional Consulting: Generate \$700,000 in web design consulting \$313k

1.1.3 Generate \$300,000 from added software features by the end of each FY. \$262k

2.3.3 Develop 2 new webinars a quarter to assist the sales team. 1

Active (12)

Recent Reports

Full Strategic Plan w/Progress 12/11/15

Strategy Review PowerPoint 11/21/15

Action Plan 11/20/15

Last Login

Shelby Cuellar 11/21/15

Jacob Sharkey 11/20/15

Christopher Pechacek 10/19/15


Step 1

Step 2-3

Step 4

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www.scouting.org/strategy 972.580.2000 V



Strategic Plan Chair

I am a strategy leader who is responsible for driving the strategic planning process and aligning my council to a unified direction.

Pages 1 - 22



Council Committee Chair

I'm a volunteer who is responsible for aligning my council committee's goals and priorities to help the council achieve its goals.

Pages 23 - 40



Volunteer/Staff

I am an individual contributor helping my council realize its strategic potential by executing against my council committee's goals and actions.

Pages 41 - 52



My Council Plan

STRATEGIC PLAN CHAIR

This section is for Strategy Leaders who are responsible for driving the strategic planning process and aligning their council to a unified direction.



My Council Plan Playbook: Strategic Plan Chair

This section is for Strategic Plan Chairs who are responsible for driving the strategic planning process and aligning their council to a unified direction.



STEP 1 Establish What Success Looks Like

Create Your Mission Statement

Create Your Vision Statement



STEP 2 Determine What is Most Important Right Now

Build Your Strategic Objectives Framework

Build your Council's Goals



STEP 3 Identify Who Needs to do What

Track the Performance of Your Goals

Train Your Committees to Develop Their Goals



STEP 4 Hold Your Committees Accountable

Improve Your Meetings

Preparing for & Running Your Strategy Review

Customize Your Dashboard



STEP 1 Establish What Success Looks Like

Create Your Mission Statement

Create Your Vision Statement

Let's get started! Before you can focus your energy around what is most important, you need to first answer these two questions for your council:

- **What is our core purpose? (Mission)**
- **Where are we going? What does success look like in 3-5 years? (Vision)**

Mission: Determine Your Council's Core Purpose

A mission statement serves the purpose of defining your "field of play." What is "inside" that we do and what is "outside" that we are not going to do?

As a leader, you control whether the mission statement is a guide to your strategic direction, or whether it becomes trite, which occurs when decisions are made that are off mission.

Being strategic only happens when you make the hard choices required of leaders. **Develop a mission statement you can use to manage and make choices easier.**

Let's ditch everything that makes mission statements useless by:

- **Boldly stating your Council's core purpose:** Why do you exist? Nothing wishy-washy here.
- **Getting at the underlying why:** Why do you do what you do?
- **Using present tense:** So you don't mix it up with your vision statement.
- **Using concrete language:** So there is no question about what you do.

Create Your Mission Statement

If you already have a Mission Statement:

1

Find your Mission Statement and copy it to your clipboard.

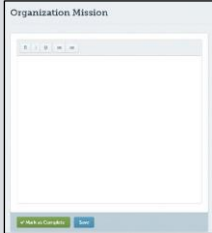
2

Paste it into the Mission Statement page.





If you don't have a Mission Statement or you want to improve an existing one:

1	Watch the 4-min whiteboard video to learn how you can create a great mission statement. (http://onstrategyhq.com/resources/video-how-to-write-a-mission-statement-that-inspires/)
2	Build your draft Mission Statement on the Mission Statement page. 
3	Stuck? Simply copy the statement below and paste it here to keep moving forward. You'll need to come back to this later. <i>Our mission is (use a verb in the present tense) + (tell us what you do) + (for whom you do it) resulting in (benefit of your work) + (location – optional).</i>

What Do Good Mission Statements Look Like?

Here are a few of our favorite examples:

Google: “To organize the world’s information and make it universally accessible and useful.”

Walmart: “We save people money so they can live better.”

Baylor University: “Educate men and women for worldwide leadership and service by integrating academic excellence and Christian commitment within a caring community.”

Boy Scouts of America: “Prepare young people to make ethical and moral choices over their lifetimes by instilling in them the values of the Scout Oath and Law.”





Vision: Cast a Vision of What Success Looks Like

A vision statement is a declaration of where you are headed – your future state. In writing your vision statement, formulate a picture of what your council's future will be. We always explain your vision as “knowing what mountain you're climbing,” and your mission as “what you are here to do.” Your vision is the statement that guides you from your current, Point A, to your ambitious future, Point B.

What does success look like 3-5 years from now?

A vision statement must be directional – pointing you and your council committees towards the place you aspire to be. For this to happen, the direction needs to be as clear as possible.

Is your vision fuzzy like a Monet? Or is it precise and crisp like a Norman Rockwell?



Claude Monet



Norman Rockwell

Be concise and craft your future direction in one or two sentences, which helps clearly communicate your vision. Use the “Vision Description” as a place for verbosity to paint with Norman Rockwell clarity.

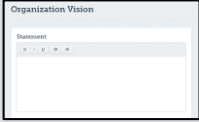
Create Your Vision Statement

If you already have a Vision Statement:

- 1** Find your Vision Statement and copy it to your clipboard.
- 2** Paste it under the “Statement” section on the Council Vision page.
- 3** Write a one-sentence vision description for what success looks like.



If you don't already have a Vision Statement or you want to improve an existing one:

1	Watch this whiteboard video to learn how to create an inspiring vision. (http://onstrategyhq.com/resources/video-how-to-write-a-vision-statement/)
2	Build your draft vision statement on the Vision Statement page. 
3	Stuck? Simply copy the statement below and paste it in the “Statement” section. You'll need to come back to this later. <i>We envision (use a verb in the future tense) + (describe the council in the future or the impact on the world).</i>
4	Copy/Paste the Strategy Map Perspectives outline below in the “Description” section. <ul style="list-style-type: none">• <i>Members and Partners:</i>• <i>Financial:</i>• <i>Process:</i>• <i>People and Technology:</i>
5	Write a one-sentence vision description for what success looks like in each area.

What Do Good Vision Statements Look Like?

Amazon.com: *“Be earth’s most customer centric company; to build a place where people can come to find and discover anything they might want to buy online.”*

McDonald’s: *“Be the world’s best quick service restaurant experience. Being the best means providing outstanding quality, service, cleanliness, and value, so that we make every customer in every restaurant smile.”*

Susan G. Komen for the Cure: *“A world without breast cancer.”*

Case Western Reserve University: *“We aim to be recognized internationally as an institution that imagines and influences the future.”*

Mid-America Council, BSA: *“Unparalleled experiences for more youth.”*

What Do Good Strategy Map Perspectives Look Like?

1. **Members and Partners:** Deliver life changing experiences for our members.
2. **Financial:** Improve property profitability.
3. **Process:** Deliver timely, relevant, and effective communications.
4. **People and Technology:** Develop competent, passionate, and diverse staff and volunteers.



Expert Advice

- **Get to 80% and worry about the exact wording later, especially when working in groups.** Word choice can make us go in circles and wastes a huge amount of time.
- **Stay grounded in reality by assessing your internal and external operating environment.**
- Check your statements to make sure that your **mission clearly explains your core purpose in the present tense** and your **vision casts a clear picture, in the future tense, of where you're headed.**

Celebrate

If your mission clearly states why you exist and your vision paints a vivid picture of where you want to be, then you've got a solid direction. Ask yourself the following clarifying questions if you're not sure:

Mission:

	Does your mission statement avoid clichés and vague words? (Make sure it's real and relevant!)
	Is it specific enough to distinguish your council from others?
	Is it short and memorable? Does it fit on a t-shirt and would you wear it?

Vision:

	Does your vision represent the preferred future of your council or your desired impact?
	Is it exciting and aspirational?

Once you've got your mission and vision, let's work on how you're going to get there!

"Great leaders do not define their vision by what it is not. Great leaders define their vision by what it is; they tell us where we are going. Kennedy didn't tell us we're not going to stay on the Earth, he told us we're going to the moon."

- Simon Sinek





STEP 2 Determine What is Most Important Right Now

Build Your Strategic Objectives Framework

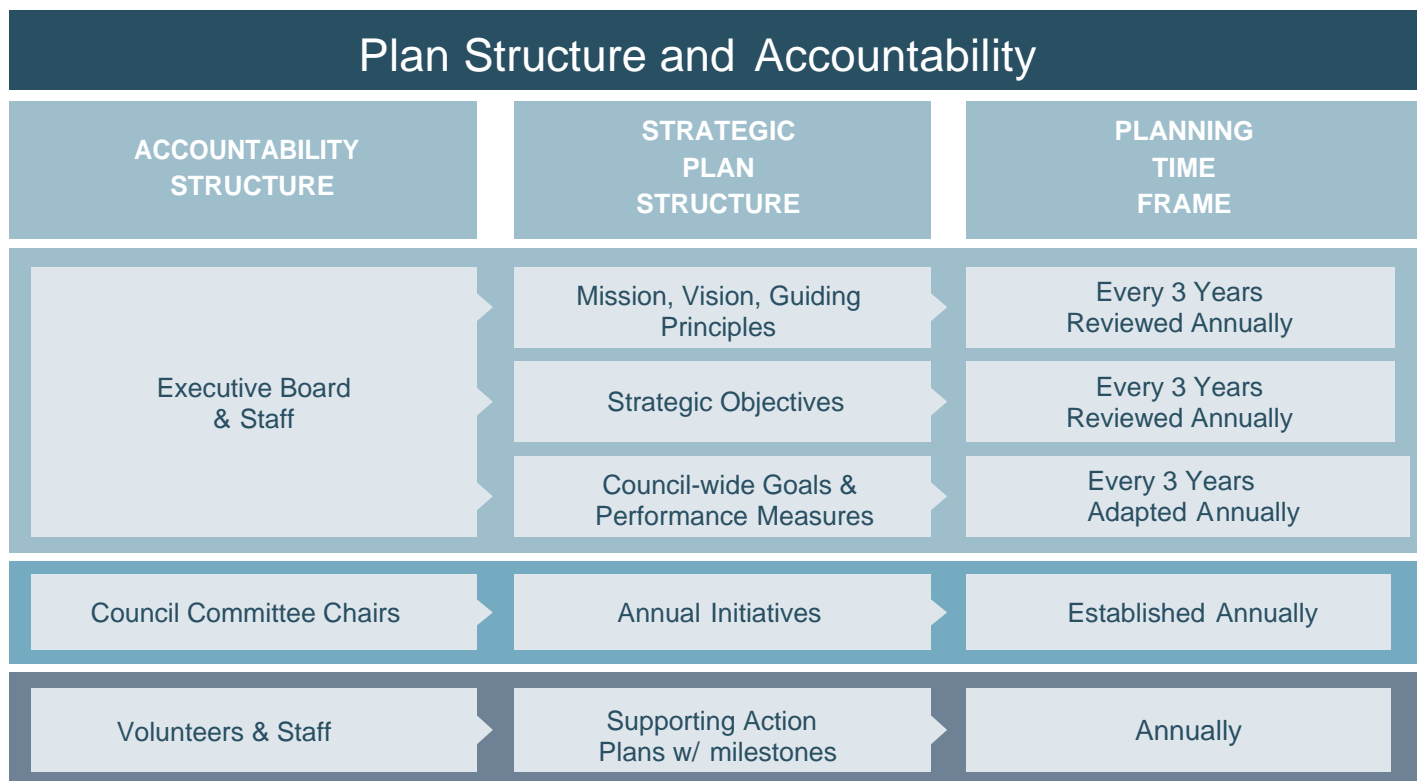
Build your Council's Goals

Build Your Strategic Plan's Framework

Congratulations! You know what success looks like for your Council, now let's go get it. This section is all about focusing your Council Committees on what's critically important – nothing more, nothing less.

Strategic Plan Structure

Here is a visual of how you build an executable strategic plan – from vision to individual actions. The key? Knowing the ownership of each level.



Strategic Objectives: Develop a Holistic Framework

Strategic objectives create the framework of your strategic plan. Everything will cascade from these statements – think of them as almost mini vision statements for each area of your council. Vision you say? We just did that! That's right – you already started strategic objectives in your vision description.

Don't know what your strategic objectives should be? Good strategic objectives are coordinated actions that address the situation in which your council finds itself. There is no better tool to summarize your council's situation than a SWOT analysis, **which you can build on the Internal/External Analysis page.**

But before we grab the vision descriptors, note that we recommend between 4 and 6 strategic objectives to make it easy to create a holistic set of strategic objectives.

Tip: Absolutely, positively no more than six total (this ensures the plan is focused).





Strategy Map Perspectives

Members and Partners

1. Customer Focus:

Financial

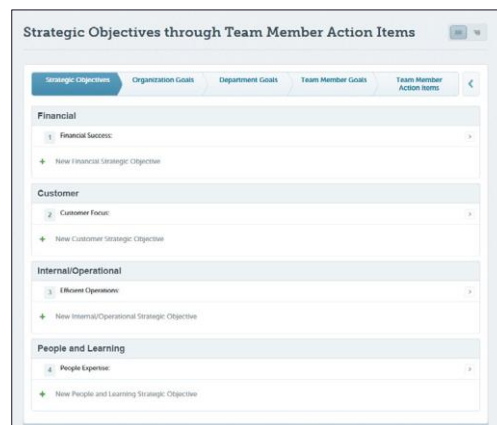
2. Financial Success:

Process

3. Efficient Operations:

People and Technology

4. People Expertise:



Build Your Strategic Objective Framework

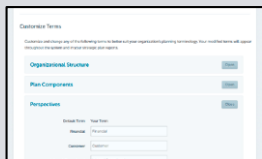
Decide if you would like to use our pre-populated Strategic Objective labels or replace with your own.

Replaced with Your Own:

1

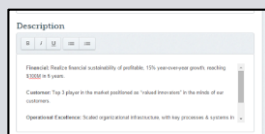
Visit the Settings page.

Under “Customized Terms” select the “Perspectives” menu, **rename the plan perspectives to match your council’s structure.** Click save changes when you are finished.



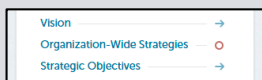
3

Copy one of your vision descriptors from the Vision Statement Page.



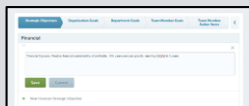
4

Click on “Strategic Objectives” from the Plan Overview page.



5

Paste in your vision descriptor underneath its correlating perspective.
Refine the language if necessary.



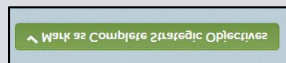
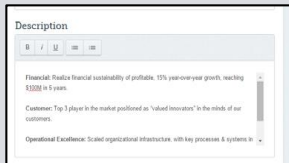


6	Repeat steps 4-6 for each vision descriptor.
7	Once you're done, click the green "Mark as Complete" button to move on.



Use the pre-populated labels:

1	Copy one of your vision descriptors from the Vision Statement Page.
2	Click on "Strategic Objectives" from the Plan Overview page.
3	Paste in your vision descriptor underneath its correlating perspective. Refine the language if necessary.
4	Repeat steps 1-4 for each vision descriptor.
5	Once you're done, click the green "Mark as Complete" button to move on.



Are these the biggest things your Council needs to focus on to reach its vision? **Do you have at least one for each perspective but no more than six total?** If yes, great work! You're done.

Council Goals: Set Annual SMART Goals

If your vision is a 3 year target and your strategic objectives are the big things you'll accomplish to achieve that vision, then council goals are the milestones to reach along the way. To get started, create a list of results you'd like to see in the next year related to each of your strategic objectives. They might look something like:

- 250K in unrestricted grants and \$1M total funding
- Always have at least 90 days of cash on hand
- Increase membership by 5%



- Quality control process for our services
- Meaningful employee recognition program in place
- All Council Committees/Districts know the “customer” they serve

Now that you have your list of results, we’re going to teach you how to turn these ideas into actionable goals.

Writing a Goal You Can Execute

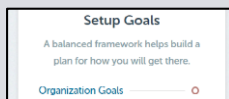
We could go on and on about **SMART** goals but what you need to know is simple — **if you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done.** My Council Plan makes this easy.

Build Your Council's Goals

1 If you haven’t already done so, set up your council committees on the [Billing & Team page](#).

2 Watch the **Goal Cascade Video**. (<http://onstrategyhq.com/resources/goal-cascade-tutorial>)

3 Click on “Council Goals” from the **Plan Overview** page.



4 Write a **description of the goal**: You need to do something. Start with a verb and keep it simple.

Example: Raise \$250k in unrestricted grants by the end of the year.

5 **Assign an owner**: Good Council Goals are cross-functional (they may require several council committees and people to collaborate to achieve it), but a single person or council committee needs to be ultimately responsible for seeing it accomplished. Choose that person or council committee here.

6 **Set start and end dates**: You’re probably great at getting things done early but the rest of us need deadlines. For council goals, the start and end dates usually correspond to your set fiscal year.



7

Set the measure and target: The measure is simply how you will track your progress on your goal.

If your goal is to increase income, the measure could be 'Friends of Scouting dollars'.

If your goal is to grow membership, the measure could be 'Number of Youth Members'.

The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

8

If this is a Key Performance Indicator, select yes. If not, leave it as no.

9

Develop at least 1 - 3 goals for each strategic objective.

What Does Good Look Like?

Here is an example of everything pulled together:

Step	Action	Target/Measure
1. Members and Partners : Raise awareness about our products outside of our local market.	1.1 Ship Scout supplies to new customers outside of our local market in order to generate 25% of sales from online in 2016. (Scout Shop)	25% % of Revenue from online Sales
	1.2 Maintain our membership growth rate of 3% per year in our local market. (Membership)	3% Membership Growth Rate
2. Financial Success: Sustain our consistent 7.5% growth rate.	2.1 Raise \$250k in unrestricted grants by the end of the year. (Fund Development)	\$250k \$'s in Unrestricted Grants Raised
	2.2 Maintain our core funding of \$1M for 2016. (Fund Development)	\$1M Core Funding
	2.3 Manage expenses to maintain cash on hand equal to 90 days of operating expenses. (Finance)	90 Days of Cash on Hand
3. Process: Deliver our highest quality services consistently.	3.1 Implement quality process reviews during all engagements to increase our 2016 net promoter score to 40. (Commissioners)	40 Net Promoter Score
4. People and Technology: Cultivate a staff and volunteer-centric culture.	4.1 Recognize and reward 1 staff and 1 volunteer per month in 2016 who exhibits excellent customer service (to internal or external customers). (Commissioners)	24 Staff/volunteers Recognized
	4.2 Identify and define customer segments for 100% of council committees. (District Chairperson)	100% % of council committees with identified customer segments



Expert Advice: 5 Keys to Creating Great Measures

- **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
- **Set measures you'll be able to gather data on frequently:** Monthly at minimum, weekly is ideal.
- **One measure per goal, period:** If there are two measures, there are two goals.
- **The measure should be descriptive enough to stand on its own. Good Examples:** Dollars, % Complete, Employees. **Better Examples:** 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
- **Clarify the data source for each measure with your council committees to ensure everyone is on the same page.**

Celebrate

You can celebrate when:

✓	Your Strategic Objectives and Council Goals reflect your council's most important priorities.
✓	You have a holistic plan framework consisting of 4 to 6 strategic objectives.
✓	You have 1-3 specific Council-Wide Goals for each Strategic Objective.
✓	Your measures and targets reflect the outcomes you're trying to achieve.
✓	All Council-Wide Goals have an owner and start/end dates.
✓	You have identified 5 KPIs among your Council Goals to help you assess progress quickly.





STEP 3 Identify Who Needs to do What

Track the Performance of Your Goals

Train Your Council Committees to Develop Their Goals

Build Your Committee-Level Goals

Now that you've architected a holistic structure for your strategic plan that outlines your critical focus areas, it's time to determine who actually needs to do what (and by when) to cascade the strategic plan. Pull your council committees in to structure the plan and develop a coordinated set of actions that will drive results.

Engaging your council committees in the plan development phase will instill a sense of ownership to drive accountability as you manage against the plan. We've developed a PowerPoint training deck (onstrategyhq.com/wp-content/uploads/2016/01/OnboardingTraining-Slides.pptx) to get your council committees proficient in developing and managing their own goals and getting them engaged while saving you time and energy.

You will be training your council committees on to how to:

1. Develop goals that your council committees can actually execute.
2. Manage performance of those goals.

Track the Performance of Your Goals

Before you train your council committees, you need to understand how the Track Performance features of My Council Plan work.

Here's how to track the performance of goals:

1

Watch this video to understand how the Track Performance section works.
(<http://onstrategyhq.com/resources/track-performance-tutorial/>)

2

Click on "Performance" in the top-level navigation.



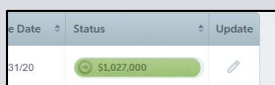
3

Click on Track Performance. If you're the Strategic Plan Chair, this will show you all of the goals that are in My Council Plan. Committee members will see just those goals that they've been assigned and those in alignment with their goals.



4

Click the pencil icon next to a goal to update it.





5

Select the “Status” of your goal in the upper right-hand corner of the goal update page:

These options include Achieved, Deferred, On Target, Off Target, Waiting on Someone, and Critical.

6

Enter the actual performance of the goal for a given time period in the “Actuals” column:

These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.

7

If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.

Click “Save and Continue.”

Want to track the performance of goals even faster? Use OnStrategy Mobile.

1

Download OnStrategy Mobile by searching “OnStrategy Mobile” in the IOS App and Google Play Store.

2

Contact the BSA Strategy Team for Login and Password. 972.580.2000

3

Click on “Flagged” to see goals that need an update.

4

Click on any goal you would like to update to open the goal card.

5

Click on the “Results” section to update your performance actual.

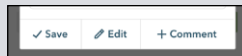
6

Select the current “Status” of the goal.



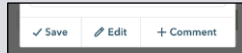
7

Click “Comment” to add a comment: Always start a comment with the date and your initials.
The most recent comments should be on the top.



8

Click “Save” to save the update.



Now that you have a solid understanding how to track the performance of the goals you created, it’s time to train your council committees.

Train Your Council Committees to Develop Their Goals

1

Schedule a 90-minute training session and invite anyone who will be responsible for executing against the plan.

The My Council Plan Council Committee Training Presentation is separated into two sections – Plan and Performance. You can deliver both sections in one training session, or you may elect to break it out into two sessions. This should depend on how much guidance your council committees need on developing goals.

2

Communicate the purpose of your meeting and set the expectation that it is mandatory. To help, we’ve drafted a message you can use below:

“Hi Council Committee-

As we’ve completed the development of our Strategic Plan, it’s time to move it into action!

We’ll be using a platform called My Council Plan to help us manage our performance against our strategic plan. My Council Plan will help make the management process much simpler and easier for all of you so that we can sustain the focus that we’ve created through the strategic planning process.

3

Lead and record the 90-minute training session using the My Council Plan Council Committee Training Presentation.

(onstrategyhq.com/wp-content/uploads/2016/01/OnboardingTraining-Slides.pptx).

4

Login to My Council Plan to use in tandem with the PowerPoint so you can show your council committees how the system works specifically with your strategic plan.

5

Use the notes section in the PowerPoint to make sure you hit all of the necessary points.

6

Set Expectations: Tell your council committees the next steps are for each to build out at least 3-5 goals within the next 5 days. Have a clear due date for council committee goals being completed!





Celebrate

You can celebrate when:

	Most important Goals have been identified and written.
	Each member of your council committee with goals has downloaded the mobile app.
	Everyone has at least tracked the performance of one goal.

Celebrate! Your council committees are ready to roll in using the My Council Plan platform for both plan development and execution!





STEP 4 Hold Your Committee Accountable

Improve your Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard

Manage Performance

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you've put in up until this point will lose value if you don't get right into strategy management to sustain the organizational focus that you've worked so hard to create. This is about maintaining that momentum.

There are a lot of nuances to effectively managing against your strategy based on your council's culture and the people involved in the process. We've identified a number of proven best practices to ensure your council committees can sustain the focus they gained through the strategic planning process and execute against the strategic plan to drive results.

The Types of Meetings You Need for Successful Implementation

Facilitating Strategy Review Meetings can be difficult. To prepare, keep in mind the purpose of the meeting and how it differs from other meetings. Below is a list of the different meeting types and their purposes:

Meeting Type	Time Required	Attendees	Purpose/Format
Monthly Strategy Review	90 mins	Council Committees & Staff	Review the performance of the council committees, decide critical issues affecting long-term success.
Quarterly Deep Dive	2-3 hours	Executive Board & Staff	Deep dive into critical issues, brainstorming & problem solving.

We don't want to spend too much time here, because this is likely something you're already doing. Instead, note the tips below for turning your meetings into something that's more impactful.

Improve Your Meetings

1

Stay consistent and have your meeting on the same day and at the same time.

2

Require attendance: All attendees are supposed to attend and participate in each and every meeting.

3

Respect everyone's time by starting and ending the meeting at the same time.





Strategy Reviews – Executive Board, Council Committee, and Staff Meetings

Having a Monthly Strategy Review meeting is arguably the most critical factor so that your plan stays agile and relevant to keep your council committees focused. The purpose of this meeting should be to report out on progress against the plan, make changes to the plan, and establish the strategic focus for the next 30 days. If you're not doing this, the focus you created during the planning phase could be lost. For more detail on how to do a great job leading a Monthly Strategy Review Meeting, **check out this video**

(<http://onstrategyhq.com/resources/video-running-a-great-strategy-review/>).

Preparing for Your Strategy Review

1	Send automated alerts from the “Notifications” section of the platform, OR send a personalized communication to all people that will be attending the meeting.
2	Have your council committees update the progress of their goals at least 5 days before your Strategy Review Meeting.
3	Check in on the progress updates of your council committees at least 3 days before your Strategy Review Meeting and send an individual email to all people who have not updated their progress.
4	Review the strategic plan and check all progress updates to assess what's happening from a performance perspective. Make notes accordingly.
5	Use the filter on the Track Performance page to look at end dates that are approaching and note any imminent end dates.
6	Use this Leader's Agenda template to build an agenda and collect all of your comments and insights from above. (http://onstrategyhq.com/wp-content/uploads/2015/12/Monthly-Strategy-Review-Leaders-Agenda-Template.pdf)
7	Use this sample agenda as a basis to develop an agenda 1-2 days before your Strategy Review Meeting. (https://onstrategyhq.com/wp-content/uploads/2015/12/Monthly-Strategy-Review-Agenda-Template.pdf)
8	<p>In your agenda, provide a report-out structure so people know what you expect from them. For each goal, example report outs might be:</p> <ul style="list-style-type: none"> • <i>Comment on the performance of the metric – results from last month.</i> • <i>Going well – what results are we seeing? And why?</i> • <i>Not going well – what are we concerned about? What are we doing about it?</i> • <i>Note learnings – what did we learn last month?</i>
9	Set aside a time in your agenda for any special topics: This will ensure that important topics don't get overlooked, but also don't override the meeting.
10	Send an email to the council committees with the agenda in the body of the email.





Customize Your Dashboard – Contact the BSA Strategy Team for Help. 972.580.2000

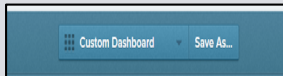
1 Click on the “Dashboard” in the top level navigation.



2 Select the “Filter” feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



3 Once you’ve filtered out these goals, click “Save As.”



4 Check the filter after saving using the dropdown menu on the left.



5 Repeat these steps for every high-level item on your agenda

Expert Advice: Synchronize Your Agenda and Dashboard

As with the agenda flow discussed in this section of the My Council Plan Playbook, think about creating dashboards that align to your Monthly Strategy Review Agenda, and are thematic in nature.

As an example if you’re using the Balanced Scorecard to build your strategic plan, you have distinct sections for Members and Partners, Financial, Process, and People and Technology, But, you certainly don’t want to facilitate your Monthly Strategy Review Meeting in that order. Instead, consider the following steps to developing more impactful dashboards and more powerful conversations:

- Pair your top-line revenue goals with the leading indicator metrics from your Financial section.
- Pair your bottom-line goals with the leading indicator metrics from your Process section.
- Consider the many levels within your People and Technology section. Although the aggregations are important, it’s exciting to see what people are accomplishing at a council committee and individual level. Consider drilling deeper.



Running Your Executive Board/Council Committee/Staff Meetings

1 Follow the agenda that you've created in the above section.

2 Facilitate the conversation using the Dashboard.

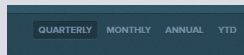
- Select the “Filter” feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



- As your council committees report on the progress of the supporting goals, navigate through the Dashboard to pull up each tile representing the goal to which they are speaking.



- Toggle between the Weekly, Monthly, and Annual views for a dynamic display of the goal you're discussing.



3 Have someone take notes on goal performance within the agenda structure.

4 If you're conducting a virtual strategy review meeting, always use the same conference call number and/or screen share to keep the logistics simple.

Strategy Review Follow Up:

1 Send a follow-up communication to your council committees that includes full meeting notes in the body of the email and any follow-up communication or topics that need to be addressed post-meeting.

2 Make necessary adjustments to the strategy plan.

Expert Advice: Managing the Strategy Review Process




- Time the meetings late enough in the month to allow for the data from the previous month to be complete.
- You need the right volunteers and staff in the meeting, and you may also pull in others who have valuable insight into council operations: Keep in mind this could be a great development opportunity for people on your council committees!



- **To the extent that you can get everyone in the same room, do so.** This isn't mission-critical, though. Better to have the right people involved and have a remote meeting than not having the meeting at all.
- **This meeting is for reviewing the performance, not problem solving.** Take things off-line and avoid any temptation to go down rabbit trail conversations.

Celebrate

You can celebrate when:

	You have scheduled out the next 6 monthly strategy reviews.
	Everyone on each council committee has reported on the progress of all items at least once.
	You have run at least one monthly strategy review.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your council – make sure it stays that way!



My Council Plan

COUNCIL COMMITTEE CHAIR

This section is for anyone leading a Council Committee



My Council Plan Playbook: Council Committee Chair Role

This section is for anyone leading a Council Committee.



STEP 1 See What Success Looks Like

Read the Plan and Identify Where Your Council Committee Aligns



STEP 2 Determine What is Most Important Right Now

Build Your Council Committee Goals

Train Your Council Committee to Develop Their Goals



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals



STEP 4 Hold Your Council Committee Accountable

Improve Your Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard



Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the My Council Plan application is a dynamic, one-page strategic plan that communicates to everyone in your council what the strategic focus is and how the council is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The below image shows you what a completed, active plan will look like when you are done.

The Playbook walks you through how to build and manage a strategic plan – in just 4 steps.

Step 1: See What Success Looks Like


Step 2 & 3: Determine What is Important Now and Get Noticed for Your Results

Step 4: Hold Your Council Committee Accountable

Acme Corporation
Powered by MyStrategicPlan

PlanPerformanceReportsDashboard

Russell P.

Get the Most out of 
THE ONSTRATEGY PLAYBOOK
SEE WHAT A GOOD PLAN LOOKS LIKE

Mission

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

Vision

We envision being THE technology experts and resource center for small and medium-sized organizations.

Core Values

Core Values:

- Professionalism - to be professional in our actions to our clients, partners and each other.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.

Strategic Objectives

60%3016719

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year over year for the next 3 years while maintaining a 20% net profit margin each year.

50% On Strategy993

Organization Goals	YTD Target	YTD Variance	Actual
1.11.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.21.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.31.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188

2. Customer Success – Professional Services: To be the professional partner of choice.

52% On Strategy6339

3. Customer Success – Maintenance Contracts: To be viewed as the top technology resource in the western region.

73% On Strategy77

4. Internal/Ops – Innovation/Product Development: Continue to develop technology innovation.

64% On Strategy844

Next Steps

Manage Performance

Keep your team motivated and inspired

- ✓ Congratulate achievers!
- ✓ Nudge those falling behind

Strategy Expert

Zach, your strategy expert is just a click away

CALL: 775 747 7404EMAIL

MANAGE CARDS

My Focus

Flagged (3)

1.1.1 Professional Consulting: Generate \$700,000 in web design consulting\$313k

1.1.3 Generate \$300,000 from added software features by the end of each FY.\$262k

2.3.3 Develop 2 new webinars a quarter to assist the sales team.1

Active (12)

Recent Reports

Full Strategic Plan w/Progress12/11/15

Strategy Review PowerPoint11/21/15

Action Plan11/20/15

Last Login

Shelby Cuellar11/21/15

Jacob Sharkey11/20/15

Christopher Pechacek10/19/15

Step 1

Step 2-3

Step 4



Introduction

Welcome to My Council Plan. Ready to drive organizational focus, create clarity, and align your council committee? This resource is for you. We've built the My Council Plan Playbook from a collection of our best thinking from working with thousands of organizations from around the globe to create and execute great strategy. It's more than just a user guide – It's a step-by-step guide of the core essentials you need to deploy a strategic plan focused on managing your council strategically.

The My Council Plan Playbook: Council Committee Chair Role

The My Council Plan Playbook has specific sections for each role. This section is for anyone leading a Council Committee.

This Toolkit's Intended Outcome:

- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the My Council Plan platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the strategic plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Council Committee Meetings:** Learn how to refine your council committee and staff meetings to be driven by your strategic performance metrics.
- **Results:** Start seeing results by focusing on what matters most and aligning your council committees to a unified direction.





STEP 1 See What Success Looks Like

Read the Plan and Identify Where Your Council Committee Aligns

As a Council Committee Chair within your Council, you have two main roles in completing the development of an executable strategic plan:

1. **You must identify and align your council committee's priorities where they will have the most impact in helping your council achieve its overall goals.** NOTE: Your council committee goals are your goals as a chair – we use these terms interchangeably.
2. **You must also work with your council committee members to create individual goals and action items that support your council committee goals.** Be clear on who needs to do what and by when.

To achieve the above two tasks, your council must have a holistic plan framework of Strategic Objectives and council goals already in place. To review what is currently in place for your council, **go to the Council Goals page.**

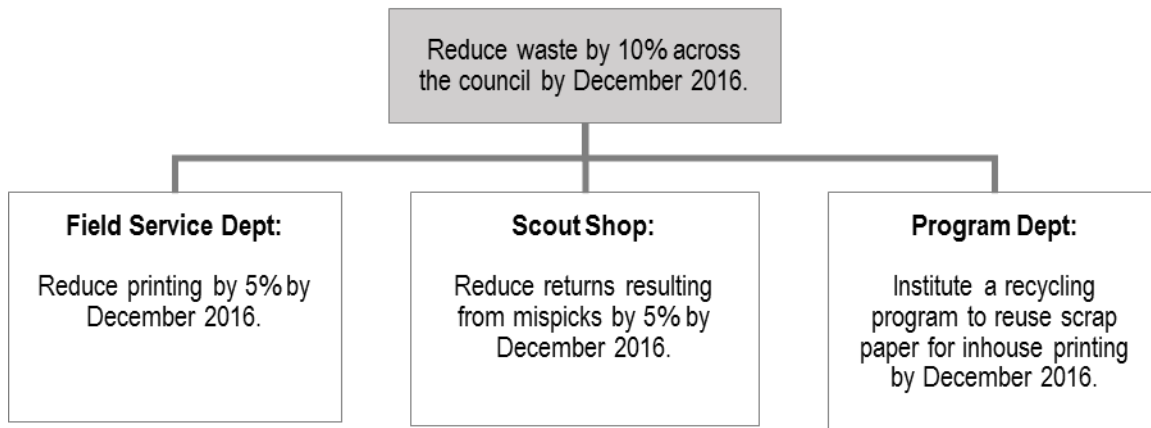
You should see:

	A holistic set of 4-6 strategic objectives that reflect your council's most important priorities.
	1-3 SMART Council Goals for each Strategic Objective.
	Measures and targets for the Council Goals that reflect the outcomes you're trying to achieve.
	Owners for each goal.
	Start and End Dates for all Council-Wide Goals.

Aligning Your Council Committee Goals

A foundational element in any strategic plan is ensuring clear alignment throughout your council. The My Council Plan platform accomplishes this through the concept of Goal Cascading. This is simply taking the big idea, like a Strategic Objective, and breaking it down into smaller, more manageable pieces according to the accountability structure within your Council. Below is a visual example of what this looks like in practice:





Read the Strategic Plan and Identify Where Your Team Aligns

1

Print the Executive Summary Report from the Reports page.



2

In the Detail section of this report, you will see your organization's Strategic Objectives and Organization-Wide Goals.

Read through these and highlight the Organization-Wide Goals your council committee directly supports.

Celebrate

You can celebrate when:



You have a good understanding of your council's overall strategy and it makes sense!



You see how your council committee supports the strategy of the council.

If you can check all the boxes above, Celebrate! You're now ready for the next step of building your Council Committee's goals.



STEP 2 Determine What is Most Important Right Now

Build Your Council Committee Goals

Train Your Council Committee to Develop Their Goals

Set Your Council Committee Goals

Once you've identified where your council committee fits in to the Council's strategy, it's time to identify how by creating your council committee's goals. We could go on and on about SMART goals and what you need to know is simple — if you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done. My Council Plan makes this easy.

Build Your Council Committee Goals

Here is the step-by-step guide for building your council committee goals:

1

Watch the Goal Cascade Video. (<http://onstrategyhq.com/resources/goal-cascade-tutorial>)

2

Click on “Committee Goals” from the Council Goals page.

3

Click on the first goal you highlighted on the Executive Summary Report on the left-hand side of this page.

4

Write a description of the goal: Describe what your council committee needs to do to support the council goal.

Example: Achieve \$250k in unrestricted grants by the end of the year.

Assign an owner: This will be you. As the council committee chair, you're ultimately responsible for your council committee's performance. We'll talk about how to delegate individual goals and actions later.





6

Set start and end dates: For your committee goals, the start and end dates usually correspond to your **fiscal year**.

Start Date: 12/05/2015
End Date: 12/05/2015

7

Set the measure / target: The measure is simply how you will track your progress on your goal.

If your goal is to increase income, the measure could be 'Friends of Scouting dollars'.

If your goal is to grow membership, the measure could be 'Number of Youth Members'.

The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

Start Date: 12/05/2015
End Date: 12/31/2015
Measure:
Goal Targets:
Target on: 12/31/2015

8

If this is a Key Performance Indicator, select yes. If not, leave it as no.

Key Performance Indicator?
Yes No

9

Develop at least 3 but no more than 7 council committee goals. More than 7 is too many for any council committee to address.

Expert Advice: 5 Keys to Creating Great Measures

1. **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
2. **Set measures you'll be able to gather data on frequently:** Monthly at minimum, weekly is ideal.
3. **One measure per goal, period:** If there are two measures, there are two goals.
4. **The measure should be descriptive enough to stand on its own. Good Examples:** Dollars, % Complete, Employees. **Better Examples:** 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
5. **Clarify the data source for each measure with your council committee to ensure that everyone is on the same page.**

Help Your Council Committee Build Goals

Now that you've architected a holistic structure for your strategic plan that outlines your critical focus areas for this year, it's time to determine who actually needs to do what (and by when) to cascade the plan. Pull in your council committee to structure the plan and develop a coordinated set of actions to drive results.





Train Your Council Committee to Develop Their Goals

1

Schedule a 60-minute training session and invite anyone on your council committee who will be responsible for executing against your goals.

The My Council Plan Council Committee Training Presentation is separated into two sections – Plan and Performance. You can deliver both sections in one training session, or you may elect to break it out into two sessions. This should depend on how much guidance your council committee needs on developing goals.

2

Communicate the purpose of your meeting and set the expectation that it is mandatory. To help, we've drafted a message you can use below:

"Hi Council Committee-

As we've completed the development of our Strategic Plan, it's time to move it into action!

We'll be using a platform called My Council Plan to help us manage our performance against the plan. My Council Plan will help make the management process much simpler and easier for all of you so that we can sustain the focus that we've created through the planning process.

I'll be sending a meeting invitation for training on the My Council Plan platform. I ask that you all make it a priority to attend."

3

Lead and record the 90-minute training session using the My Council Plan Council Committee Training Presentation.

(onstrategyhq.com/wp-content/uploads/2016/01/OnboardingTraining-Slides.pptx)

4

Login to the My Council Plan to use in tandem with the PowerPoint so you can show your council committee how the system works specifically with your plan.

5

Use the notes section in the PowerPoint to make sure you hit all of the necessary points.

6

Set Expectations: Tell your council committee the next steps are for each to build out at least 3-5 goals within the next 5 days. Have a clear due date for council committee member goals being completed!

7

Send your council committee a Welcome Email - a customizable communication that you can send directly from within My Council Plan. This will supply them with a link to My Council Plan and their login credentials. Include a reminder date for when you expect their goals to be completed.

8

Send out this Cheat Sheet handout and inform your council committee that the "More Info" tab in the system is a helpful resource moving forward.

(<http://onstrategyhq.com/wp-content/uploads/2015/12/OnStrategyCheatSheet.pdf>)

9

Review your council committee members' goals to ensure all items meet the SMART guidelines and are holistically the right set of priorities for everyone.





Celebrate

You can celebrate when:



Your council committee has developed and owns between 3-7 SMART goals.



Your measures and targets reflect the outcomes you're trying to achieve with your council committee in the next year.



You have identified 3-5 KPIs among your council committee goals to help you assess progress quickly.



All goals have an owner and start/end dates.





STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals

Moving Into Execution

Now that your plan is completed, you are ready to move into execution. We think doing the hard work of execution is more important than spending time writing performance reports or sitting in report-out meetings. A simple interface is provided for every council committee member to quickly and easily report on performance – weekly is ideal, monthly is sufficient. In fact, if it takes each council committee member more than 15 minutes per month, it's too long. The My Council Plan platform acts as the “air traffic control tower” of your strategic management system. With every council committee member reporting in, you'll know where to focus, adjust and modify to stay on strategy.

Track the Performance of Your Goals

Here's how to track the performance of goals within the platform:

1

Watch this video to understand how the Track Performance section works.
(<http://onstrategyhq.com/resources/track-performance-tutorial/>)

2

Click on “Performance” in the top-level navigation.



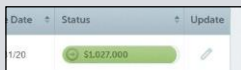
3

Click on Track Performance. As a council committee chair, you'll see all the goals assigned to you and all of the goals assigned to your council committee that support your performance. Council committee members will see just those goals that they've been assigned to and those in alignment with their goals.



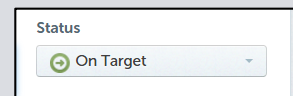
4

Click the pencil icon next to a goal to update it.



5

Select the “Status” of your goal in the upper right-hand corner of the goal update page: These options include Achieved, Deferred, On Target, Off target, Waiting on Someone, and Critical.





6

Enter the actual performance of the goal for a given time period in the “Actuals” column: These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.

	Aug 2015	Sep 2015	Oct 2015	Nov 2015	Dec 2015
Actuals	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Targets	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000

7

If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.

Comments on Status

2/2/15: Missed sales target this month due in large part to being closed for weather

End of responses

8

Click “Save and Continue.”

Save & Continue Save Cancel

Want to track the performance of goals even faster? Use OnStrategy Mobile.

1

Download OnStrategy Mobile by searching “OnStrategy Mobile” in the IOS and Google Play Store.

2

Login using your credentials. (Contact the BSA Strategy Team for credentials. 972.580.2000)

3

Click on “Flagged” to see goals that need an update.

My Goals Supporting Goals

Flagged (5)

4

Click on any goal you would like to update by opening the goal card.

5

Click on the “Results” section to update your performance.

RESULTS FOR MONTH NOVEMBER '15
(LAST UPDATED 11/23/15)

%

6

Select the current “Status” of the goal.

STATUS

On Target

7

Click “Comment” to add a comment: Always start a comment with the date and your initials. The most recent comments should be on the top.

✓ Save Edit + Comment

8

Click “Save” to save the update.

✓ Save Edit + Comment





Celebrate

You can celebrate when:



You've downloaded the mobile application.



You have tracked the performance of your goals.





STEP 4 Hold Your Committee Accountable

Improve Your Meetings

Preparing For & Running Your Strategy Review

Customize Your Dashboard

Use the Dashboard to Transform Your Meetings

“Without execution, vision is just another word for hallucination.” – Mark Hurd - Hewlett-Packard CEO

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you’ve put in up until this point will lose value if you don’t get right into strategy management to sustain the council focus that you’ve worked so hard to create. This is about maintaining that momentum. To get a solid understanding of what good strategy implementation should look like, **check out this video** (<http://onstrategyhq.com/resources/video-the-secret-to-strategic-implementation/>).

There are a lot of nuances to effectively managing against your strategy based on your council’s culture and the people involved in the process. We’ve identified a number of proven best practices to ensure your council committee can sustain the focus they gained through the strategic planning process and execute against the strategic plan to drive results.

Improve Your Meetings

- 1 Stay consistent and have your meeting on the same day and at the same time.**
- 2 Require attendance:** All attendees are supposed to attend and participate in each and every meeting.
- 3 Rotate the meeting host to keep your council committee on their feet!**
- 4 Respect everyone’s time by starting and ending the meeting at the same time.**

Monthly and Quarterly Strategy Reviews

Having a Monthly Strategy Review meeting is arguably the most critical factor so that your plan stays agile and relevant to keep your council committee focused. The purpose of this meeting should be to report out on progress against the plan, make changes to the plan, and establish the strategic focus for the next 30 days. If you’re not doing this, the focus you created during planning could be lost. For more detail on how to do a great job leading a Monthly Strategy Review meeting, **check out this video** (<http://onstrategyhq.com/resources/video-running-a-great-strategy-review/>).





Preparing For Your Strategy Reviews

1	Ask your strategy leader to send an automated alert from the “Notifications” section of the platform OR a personalized communication to all people that will be attending the meeting.
2	Have your council committee update the progress of their goals at least 5 days before your Strategy Review Meeting.
3	Check in on the progress updates of your council committee at least 3 days before your Strategy Review Meeting and send an individual email to all people who have not updated their progress.
4	Review the plan and check all progress updates to assess what’s happening from a performance perspective. Make notes accordingly.
5	Use this Leader’s Agenda template to build an agenda and collect all of your comments and insights from above. (https://onstrategyhq.com/wp-content/uploads/2015/12/Monthly-Strategy-Review-Leaders-Agenda-Template.pdf)
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8	Set aside a time in your agenda for any special topics: This will ensure that important topics don’t get overlooked, and also don’t override the meeting.
9	Send an email to the council committee with the agenda in the body of the email.





Customize Your Dashboard (Contact the BSA Strategy Team for Assistance 972.580.2000)

1

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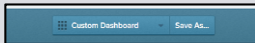
2

Select the “Filter” feature in the Dashboard and use it to extract only goals that you want to see. As an example, filter to find just the goals supporting the first high-level item on your agenda.



3

Once you’ve filtered out these goals, click “Save As.”



4

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5

Repeat these steps for every high-level item on your agenda.

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As with the agenda flow discussed in this section of the My Council Plan Playbook, think about creating dashboards that align to your Monthly Strategy Review Agenda, and are thematic in nature.

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- Pair your bottom-line goals with the leading indicator metrics from your Process section.
- Consider the many levels within your People and Technology section. Although the aggregations are important, it’s exciting to see what people are accomplishing at a council committee and individual level. Consider drilling deeper.





Running Your Strategy Reviews

1

Follow the agenda that you've created in the above section.

2

Facilitate the conversation using the Dashboard.

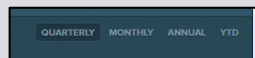
- **Select the “Filter” feature in the Dashboard and use it to extract only goals that you want to see.** As an example, filter to find just the goals supporting the first high-level item on your agenda.



- **As your council committee reports on the progress of the supporting goals, navigate through the Dashboard to pull up each tile representing the goal to which they are speaking.**



- **Toggle between the Weekly, Monthly, and Annual views for a dynamic display of the goal you're discussing.**



4

Have someone take notes on goal performance within the agenda structure.

5

Keep the conversation moving. “Park” any topics that start to go deep into problem solving as these should be discussed later.

6

If you are conducting a virtual strategy review meeting, always use the same conference call number and/or screen share to keep the logistics simple.

Strategy Review Follow Up:

1

Send a follow-up communication to your council committee that includes full meeting notes in the body of the email and any follow-up communication or topics that need to be addressed post- meeting.

2

Make necessary adjustments to the strategic plan.



Expert Advice: Managing the Strategy Review Process

- **As a council committee chair, lead your reviews and participate in the council leadership Strategy Reviews.** Therefore, your strategy leader will be following these same steps in preparation for the overall review of your strategic plan.
- **To the extent that you can get everyone in the same room, do so.** This isn't mission-critical, though. Better to have the right people involved and have a remote meeting than not having the meeting at all.
- **This meeting is for reviewing the performance, not problem solving.** Take things off-line and avoid any temptation to go down rabbit trail conversations.

Celebrate

You can celebrate when:

- Everyone on your council committee has reported on the progress of all items.
- You have reviewed your goals at every council committee meeting.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your council - make sure it stays that way!



My Council Plan

VOLUNTEERS / STAFF

This section is for individual contributors helping a council realize its strategic potential by executing against their council committee's goals and actions.



My Council Plan Playbook: Volunteer/Staff Role

This section is for individual contributors helping a council realize its strategic potential by executing against their council committee's goals and actions.



STEP 1 See What Success Looks Like

Read the Plan and Identify Where You Align



STEP 2 Determine What is Most Important Right Now

Build Your Individual Goals



STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals



STEP 4 Stay Connected to Your Council Committee's Performance

Get Prepared for a Strategy Review



Welcome to Your Dynamic, One-Page Strategic Plan

As Steven Covey says, always start with the end in mind. The home page of the My Council Plan application is a dynamic, one-page strategic plan that communicates to everyone in your council what the strategic focus is and how the council is performing against the strategy – real time. You can configure the cards on the page to display the parts of the plan you want to keep in focus. The below image shows you what a completed, active plan will look like when you are done.

The Playbook walks you through how to build and manage a strategic plan– in just 4 steps.

Step 1: See What Success Looks Like


Step 2 & 3: Determine What is Most Important Now and Get Noticed for Your Results

Step 4: Stay Connected to Your Council Committee's Performance

Acme Corporation
Powered by MyStrategicPlan

PlanPerformanceReportsDashboard

Russell P.

Get the Most out of 
THE ONSTRATEGY PLAYBOOK
SEE WHAT A GOOD PLAN LOOKS LIKE

Mission

Our core purpose is to create technology solutions for forward-thinking organizations to empower their success and to magnify their impact.

Vision

We envision being THE technology experts and resource center for small and medium-sized organizations.

Core Values

Core Values:

- Professionalism - to be professional in our actions to our clients, partners and each other.
- Client Focus - a razor-sharp focus on our customer's growth is essential and the only way to succeed.
- Integrity - to have honesty and respect for all individuals.
- Leadership - to empower and inspire entrepreneurial leaders.

Strategic Objectives

60%3016719

1 Financial Sustainability: Grow our business in a responsible and controlled way to increase revenue by 30% year-over-year for the next 3 years while maintaining a 20% net profit margin each year.
50% On Strategy
993

Organization Goals	YTD Target	YTD Variance	Actual
1.1 1.1 Generate sales of \$40 million by the end of the year	\$30M	\$500k	\$30.5m
1.2 1.2 Maintain profitability with a budget allocation of 50% for business re-investment for product development.	50%	-3%	47%
1.3 1.3 Increase average billable hour factor.	\$187.5	\$0.5	\$188

2. Customer Success – Professional Services: To be the professional partner of choice.
52% On Strategy
6339

3. Customer Success – Maintenance Contracts: To be viewed as the top technology resource in the western region.
73% On Strategy
77

4. Internal/Ops – Innovation/Product Development: Continue to develop technology innovation.
64% On Strategy
844

Next Steps

Manage Performance
Keep your team motivated and inspired

- ✓ Congratulate achievers!
- ✓ Nudge those falling behind

Strategy Expert

Zach, your strategy expert is just a click away
CALL: 775 747 7404 EMAIL

MANAGE CARDS

My Focus

Flagged (3)

1.1.1 Professional Consulting: Generate \$700,000 in web design consulting
\$313k

1.1.3 Generate \$300,000 from added software features by the end of each FY.
\$262k

2.3.3 Develop 2 new webinars a quarter to assist the sales team.
1

Active (12)

Recent Reports

Full Strategic Plan w/Progress
12/11/15

Strategy Review PowerPoint
11/21/15

Action Plan
11/20/15


Last Login

Shelby Cuellar 11/21/15
Jacob Sharkey 11/20/15
Christopher Pechacek 10/19/15

Step 1

Step 2-3

Step 4

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Introduction

Welcome to My Council Plan. Ready to drive organizational focus, create clarity, and align your council committee? This resource is for you. We've built the My Council Plan Essentials Guide from a collection of our best thinking from working with thousands of organizations from around the globe to create and execute great strategy. It's more than just a user guide – it's a step-by-step guide of the core essentials you need to deploy a strategic plan focused on managing your council strategically.

The My Council Plan Playbook: Individual Contributor Role

The My Council Plan Playbook has specific sections for each role. This section is for individual contributors – volunteers and staff. For simplicity purposes, we'll use "council committee member" throughout this guide

This Toolkit's Intended Outcome:

- **Simple and Directive Steps:** We've provided clear steps to help you with basic planning, creating foundational plan content, and structuring your plan for the My Council Plan platform.
- **Everyone Knows What is Expected:** Everyone involved in building and managing the strategic plan will be clear on their role and be trained to use the platform.
- **Everyone is Responsible:** Everyone involved will have goals with defined outcomes and clear ownership, which can be managed on a monthly basis [minimum].
- **Metric Driven Council Committee Meetings:** Learn how to refine your Council Committee meetings to be driven by your strategic performance metrics.
- **Results:** Start seeing results by focusing on what matters most and aligning your council committee to a unified direction.





STEP 1 See What Success Looks Like

Read the Plan and Identify Where You Align

As an individual contributor, your role in completing the development of an executable strategic plan is to create individual goals and action items that clarify what you are doing and by when.

To review what is currently in place for your Council, **see the Council Goals page.**

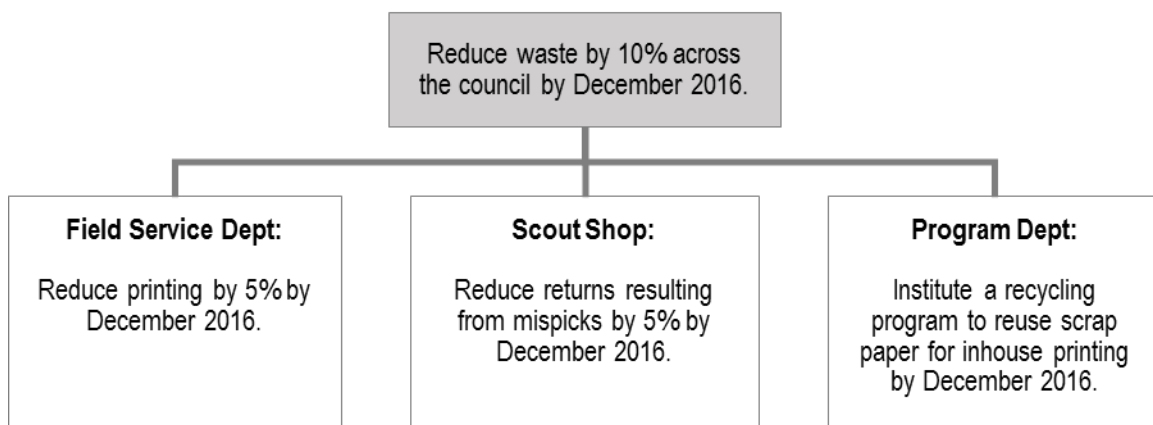
You should see:

	A holistic set of 4-6 strategic objectives that reflect your council's most important priorities.
	1-3 SMART Council Goals for each Strategic Objective.
	Measures and targets for the Council-Wide Goals that reflect the outcomes your council is trying to achieve in the next year.
	Council Committee Goals that set the priorities for your council committee and illustrate for what part of the goals you are responsible.

These items are the foundation of any good strategic plan. If your plan's foundation doesn't meet all of the criteria listed above, you are not ready to build upon it and you should contact your strategy leader.

Aligning Your Goals

A fundamental component of My Council Plan is ensuring clear alignment throughout your council. The My Council Plan system accomplishes this through the concept of Goal Cascading. This is simply the idea of taking a big idea, like a Strategic Objective, and breaking it down into smaller, more manageable pieces according to the accountability structure within your council. Below is a visual example of what this looks like in practice.





Read the Plan and Identify Where You Align

1

Print the Executive Summary Report from the Reports Page.

Plan Reports	Performance Reports
<ul style="list-style-type: none"> Executive Summary A summary of the council's overall strategy and its impact on the community. Strategic Plan A document that outlines the council's vision, mission, and goals. Annual Report A report that provides an overview of the council's activities and achievements for the past year. Financial Report A report that details the council's financial performance and budget. Program Report A report that focuses on the council's various programs and their impact. Membership Report A report that tracks the council's membership numbers and trends. Community Impact ReportA report that highlights the council's contributions to the local community. 	<ul style="list-style-type: none"> Leadership Report A report that evaluates the performance of the council's leadership team. Program Performance Report A report that assesses the effectiveness of the council's various programs. Financial Performance Report A report that analyzes the council's financial health and trends. Membership Performance Report A report that examines the council's membership growth and retention. Community Impact Report A report that measures the council's social and environmental impact. Overall Performance Report A comprehensive report that summarizes the council's overall performance.

2

In the “Detail” section of this report, you will see your council’s Strategic Objectives, Council Goals and Council Committee Goals. Read through these and highlight the Council Committee Goals you directly support.

You may support Council Committee Goals that don’t belong to your council committee. Cross-functional collaboration is a necessary component of successful strategy implementation, so be on the lookout for other Council Committee Goals you may need to support.

Celebrate

You can celebrate when:



You have a good understanding of your council’s overall strategy and it makes sense!



You see how your work supports the strategy of the council.



You have highlighted the council committee goals that you directly contribute to.

If you can check all the boxes above, Celebrate! You’re now ready for the next step of building your individual goals.





STEP 2 Determine What is Most Important Right Now

Build Your Individual Goals

Once you've identified **where** you fit in to the council's strategy, it's time to identify **how** by creating your individual goals. We could go on and on about SMART goals but what you need to know is simple- **If you want something to get done, you need to be clear about what you want done, who is going to do it, and when it needs to be done.**

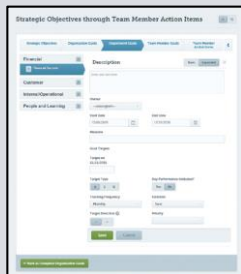
Build Your Individual Goals

1

Watch the Goal Cascade Video. (<http://onstrategyhq.com/resources/goal-cascade-tutorial>)

2

Click on "Council Committee Member Goals" from the Council Goals page.



3

Click on the first Council Committee Goal you highlighted on the Executive Summary Report on the left-hand side of this page.

4

Describe what you need to do to support the Council Committee Goal.

Example: Achieve \$250k in unrestricted grants by the end of the year.

5

Assign an owner: This will be you. First select your council committee/manager from the drop-down menu. In the second drop-down menu, select your name.

6

Set start and end dates: Use the start and end date to signal when the goal will begin and when it will end. If the goal is ongoing, the start and end dates usually correspond to your **set fiscal year**.





7

Set the measure and target: The measure is simply how you will track your progress on your goal.

If your goal is to increase income, the measure could be 'Friends of Scouting dollars'.

If your goal is to grow membership, the measure could be 'Number of Youth Members'.

The target is the numerical figure that corresponds to the #, \$, or % of what you're trying to achieve.

Start Date: 12/15/2015
End Date: 12/31/2015
Measure:
Goals/Targets:
Targets on: 12/31/2015

8

If this is a Key Performance Indicator, select yes. If not, leave it as no.

Key Performance Indicator?
Yes No

Expert Advice: 5 Keys to Creating Great Measures

1. **Great measures allow you to directly measure the outcome** (e.g. Revenue, Process, Employee Retention) **or quantify the process** (e.g. % of project complete, # of training sessions held)
2. **Set measures you'll be able gather data on frequently:** Monthly at minimum, weekly is ideal.
3. **One measure per goal, period:** If there are two measures, there are two goals.
4. **The measure should be descriptive enough to stand on its own. Good Examples:** Dollars, % Complete, Employees. **Better Examples:** 2016 Annual Revenue, CRM Implementation % Complete, # of New Employees Hired.
5. **Clarify the data source for each measure with your council committee to ensure everyone is on the same page.**

Celebrate

You can celebrate when:



Your measures and targets reflect the outcomes you're trying to achieve.



Your goals are assigned to you and they have start and end dates.



You have identified KPIs among your goals to help you assess progress quickly.





STEP 3 Get Noticed for Your Results

Track the Performance of Your Goals

Manage the Performance of Your Goals

Now that your plan is completed, you are ready to move into execution. Doing the hard work of execution is more important than spending time writing performance reports or sitting in report-out meetings. We created a simple interface to allow you to quickly and easily report on your performance – weekly is ideal, monthly is sufficient.

In fact, if it takes you more than 15 minutes per month to update your goal's performance, it's too long. The My Council Plan platform acts as the “air traffic control tower” of your strategic management system. With every council committee member reporting in, your council committee chair will know where to focus, adjust, and modify to stay on strategy.

Track the Performance of Your Goals

Here's how to track the performance of goals within the platform:

1

Watch the video to understand how the Track Performance section works.
(<http://onstrategyhq.com/resources/track-performance-tutorial/>)

2

Click on “Performance” in the top-level navigation.



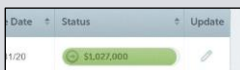
3

Click on Track Performance. Council committee members will see just those goals that they've been assigned to and those in alignment with their goals.



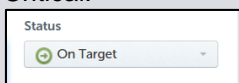
4

Click the pencil icon next to a goal to update it.



5

Select the “Status” of your goal in the upper right-hand corner of the goal update page: These options include Achieved, Deferred, On Target, Off Target, Waiting on Someone, and Critical.





6

Enter the actual performance of the goal for a given time period in the “Actuals” column: These “Actuals” will show the performance against your incremental “Targets” you set when creating the goal.

	Aug 2015	Aug 2015	Aug 2015	Aug 2015	Aug 2015
Actuals	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000
Targets	\$10,000	\$10,000	\$10,000	\$10,000	\$10,000

7

If the goal requires more qualitative commentary, leave a comment in the “Comments” field. Always start a comment with the date and your initials. The most recent comments should be on the top.

Comments on Status

2/2/16 - Missed sales target this month due to large part to being closed for weather

Actual expenses

8

Click “Save and Continue.”

Save & Continue Save Cancel

Want to track the performance of goals even faster? Use OnStrategy Mobile.

1

Download OnStrategy Mobile by searching “OnStrategy Mobile” in the IOS and Google Play Store.

2

Login using your credentials. (Contact the BSA Strategy Team for credentials. 972.580.2000)

3

Click on “Flagged” to see goals that need an update.

My Goals Supporting Goals

Flagged (5)

4

Click on any goal you would like to update by opening the goal.

5

Click on the “Results” section to update your performance actual.

RESULTS FOR MONTH NOVEMBER 15
(LAST UPDATED 11/23/15)

%

6

Select the current “Status” of the goal.

STATUS

On Target

7

Click “Comment” to add a comment: Always start a comment with the date and your initials. The most recent comments should be on the top.

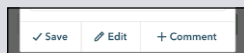
✓ Save Edit + Comment





8

Click “Save” to save the update.



Celebrate

You can celebrate when:



You understand a good status report includes an update of actual performance, current status of the goal, and a one-line comment to provide context.



You’ve downloaded the mobile app.



You’ve tracked the performance of every goal assigned to you.





STEP 4 Stay Connected With Your Team's Performance

Get Prepared for a Strategy Review

Be Prepared for a Strategy Review

“Without execution, vision is just another word for hallucination.” – Mark Hurd - Hewlett-Packard CEO

Monthly and quarterly review meetings are the heartbeat of the strategic management process. All the work that you've put in up until this point will lose value if you don't get right into strategy management to sustain the organizational focus that you've worked so hard to create. This is about maintaining that momentum.

Get Prepared for a Strategy Review

1

Update the performance of all goals you own 5 days before your Strategy Review. See the previous section for instructions on how to complete a progress update.

2

Review the performance of any items that support your goals.

3

Review the agenda provided by your council committee chair.

Prepare your report-out for each goal. An example report-out for each goal is as follows. Remember, a good report-out is succinct and less than 2 minutes. An example report-out for each goal is as follows.

- *Comment on the performance of the metric – movement from last month.*
- *Going well – what movement results are we seeing? And why?*
- *Not going well – what are we concerned about? What are we doing about it?*
- *Note learnings – what did we learn last month?*

Celebrate

You can celebrate when:



You successfully reported on the progress of all items at least once.



You participated in at least one monthly strategy review.

Celebrate! You've reached the ideal state of strategy management. Keep up the great work. Remember, your Strategic Plan should be a living, breathing document that is relevant to the management of your council - make sure it stays that way!

