Is Everyone Paddling in the Same Direction?
Building a strategy plan for rowing the boat

Everyone in the boat, paddling in the same direction

VOYAGE (Agenda)
- Gather your crew (team + information)
- Gather provisions (mission)
- Chart your course (vision)
- Navigation tools (core values)
- Channel markers (goal and objectives)
- Ports-of-call (strategies, milestones)
- Pull up anchor/shove off" (implementation)
- Check your compass (performance measurement)
- Perils at sea (issues and priorities)
- Destination (goals accomplished)
Strategic Plan...is it necessary to have one to arrive at the desired destination, particularly in the new virtual world?

Gives us direction out on the open seas so we can accomplish our mission........... even in uncertain times and in uncharted waters.

What else does a Strategic Plan do?

- Tap into the talents of staffing resources
- Align departmental activities with organizational
- Build on departmental strengths
- Take advantage of opportunities
- Build credibility with customers and stakeholders
- Demonstrate value of procurement

Why you don’t currently have a strategic plan, or if you do, any challenges you faced in creating or implementing your strategic plan.

Post your response in the ‘Chat’ and then discuss with other participants.
Step 1 – Gather your crew (Team + Information)

- Recruit your crew members
- Pre-work
  - Survey staff and synthesize results
    - What do we do?
- Current and projected trends
- Current Procurement Mission & Vision
- Organization Mission, Vision & Goals

Information (cont’d)

What do we do?

- Oversee process
- Contract Administration
- Supplier Management
- Acquisition - Disposal
- Approve payments
- Procure goods and services
- Create
- Add value
- Develop innovative procurement approaches
- Provide training
- Obtain best value
- Follow best practices
- Manage & process inventory
- Partner with customers
- Ensure cost effectiveness / maximize funds
- Conduct market research
- Price & Cost Analysis
- Seek, develop & maintain reliable sources
- Provide a service

Information (cont’d)

PEST survey
- Political
- Economic
- Social
- Technical

SWOT
- Strengths
- Weaknesses
- Opportunities
- Threats

SOAR analysis
- Strengths
- Opportunities
- Aspirations
- Results
Information (cont’d)

• Synthesize info
• Compile the info
• Distribute to crew

BRAINSTORMING FRAMEWORK

Step 2 – Gather Provisions (Mission)

• Foundation of the strategic plan
• Describe our purpose (why we exist)
• Specific
• Serves as a decision benchmark
Create

- Assess the possibilities
- Create a draft statement
- Re-evaluate (Don’t over analyze or complicate)
  - Who we are / What we do
  - Who we do it for
- Group consensus
- Finalize

Example Mission Statement

- We are committed to focusing on our customers, delivering superior quality and offering the best services. Even more, we realize customer satisfaction drives everything we do, and we are unyielding in our promise to meet their expectations in quality, delivery, and performance.

What does this organization actually do?
Post your response in the ‘Chat’....

Example Mission Statement

- To be an organization most admired for its people, partnership, and performance.

What is this company’s purpose, what does it do?
Post your response in the ‘Chat’
Step 3 – Chart the course (Vision)

- Chart the course
- Understandable
- Futuristic
- Focused
- Relevant
- Think BIG
- Distinctively “Us”
- Motivate

Vision Example

“A just world without poverty” [Oxfam]

“To accelerate the world’s transition to sustainable energy” [Tesla]

“A world without Alzheimer’s disease.” [Alzheimer’s Association]

“Crush Adidas” [Nike in 1960s]

“To become the Harvard of the West” [Stanford University previous]

Step 4. Navigation Tools (Core Values)

- Core Values are not aspirations
- Must be real
- Must be incorporated into everything you do

- Communication
- Respect
- Integrity
- Excellence
Core Values

Integrity – Doing the right thing
Effective – Putting in the effort to achieve the best results
Fair – Being impartial and unbiased
Collaborative – Working together for common goals
Transparent – Conducting business in an open and easily understandable manner
Innovative – Incorporating imagination and inventiveness in all we do

Step 5 – Channel Markers (Goals & Objectives)

GOALS

• Challenge us
• Tied to organizational goals
• End point which activities are aimed
• Energize us to achieve more
• Provide a clear path

OBJECTIVES

• Key to obtaining results
• Support accomplishing goals
• Measure your progress

SMART Objectives

Specific
Measurable
Attainable
Relevant
Timed
Step 6 – Ports-of-call (Strategies + Milestones)

- Strategies break Objectives into ‘bite-size actions’
- Milestones provide target dates for completion

Step 7 – Pull up anchor/shove off (Implementation)

- Communication
- Commitment
- Motivation
- Allocation

Step 8 – Check your compass (Performance)

- Control mechanism
- Set the baseline
- Metrics must be reproducible
- Alert us to issues
Why do you think strategic plans fail?

Post your response in the ‘Chat’ and then discuss with other participants.

Step 9 – Perils at Sea (issues + priorities)

• Fog
• Mutiny
• Sharks
• Icebergs
• Whales

Perils at Sea (cont’d)

• Hurricane/Storm
• Equipment Failure
• Sea Dragons
• Sand Bars
• Pirates
Step 10 – Destination (Goals Accomplished)

• You’ve done it once, can you do it again?
• Shoot for the stars - bigger, better, faster.
• Change focus.
• Don’t stop.

You Did It!

“What you get by achieving your goals is not as important as what you BECOME by achieving your goals”

Zig Ziglar

“…..always stretch yourself beyond your limits….you are capable of accomplishing more than you know

…..but you will never know your full potential unless you keep challenging yourself…..”

Roy T. Bennett, The Light in the Heart
Closing Remarks

• Follow your strategic plan
• Keep everyone paddling in the same direction
• Regularly check on your progress
• Set a new course when needed
• Don’t abandon ship

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• Thank You For Attending
  • Here’s wishing you “fair winds”
  • on your voyage.