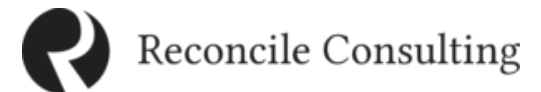


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STRATEGIC
CONSULTANTS

*Strategic Leadership
Conference
Tuesday, October 4th, 2022*



Strategic Planning in an (almost) post-COVID world

Carl Williams, Founder and CEO

Josh Kornberg, EdD, CFRE, Senior Advisor

Agenda

- Introductions
- What is a strategic plan?
- Why do they end up on a shelf?
- How to hit the reset button on a plan.
- What do I need to start?
- Tips and tricks for implementation.
- Question and Answer

About Carl

- Founder, President & Chief Energy Officer at 20/twenty Strategic Consultants
- 20+ years as a Business Coach, Trainer and Educator
- CEO, Professor, Chair, Nonprofit Executive Director, Pastor
- Served on more than 15 Nonprofit Boards
- Board Service: Community Foundation of Louisville, Volunteers of America Mid-States, Teach Kentucky...

About Josh

- Executive Director of Caesars Foundation of Floyd County
- Academic background in organizational development
- *Strategic Planning in Small, Family-Owned Firms*, author
- Indiana University Alumni Association, national chair
- Served on 10+ non-profit board

Meet a friend!

- Name
- Organization
- One thing we hope to learn from this session
- Favorite Christmas movie



What is a strategic plan?

Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment.



What strategic planning isn't.

- One goal.
- One idea.
- Being all things to all people.
- It's not about what we do.
- Is not meant to sit on a shelf.



Why do plans end up on a shelf?

- Too broad.
- Too narrow.
- Too complicated.
- Not realistic.
- Not dynamic.
- No one to manage the work.



Hitting reset.

- We deserve a reset.
- It's healthy to re-assess.
- Shifting priorities:
 - COVID.
 - The workforce.
 - Inflation.

Reset ≠ Failure

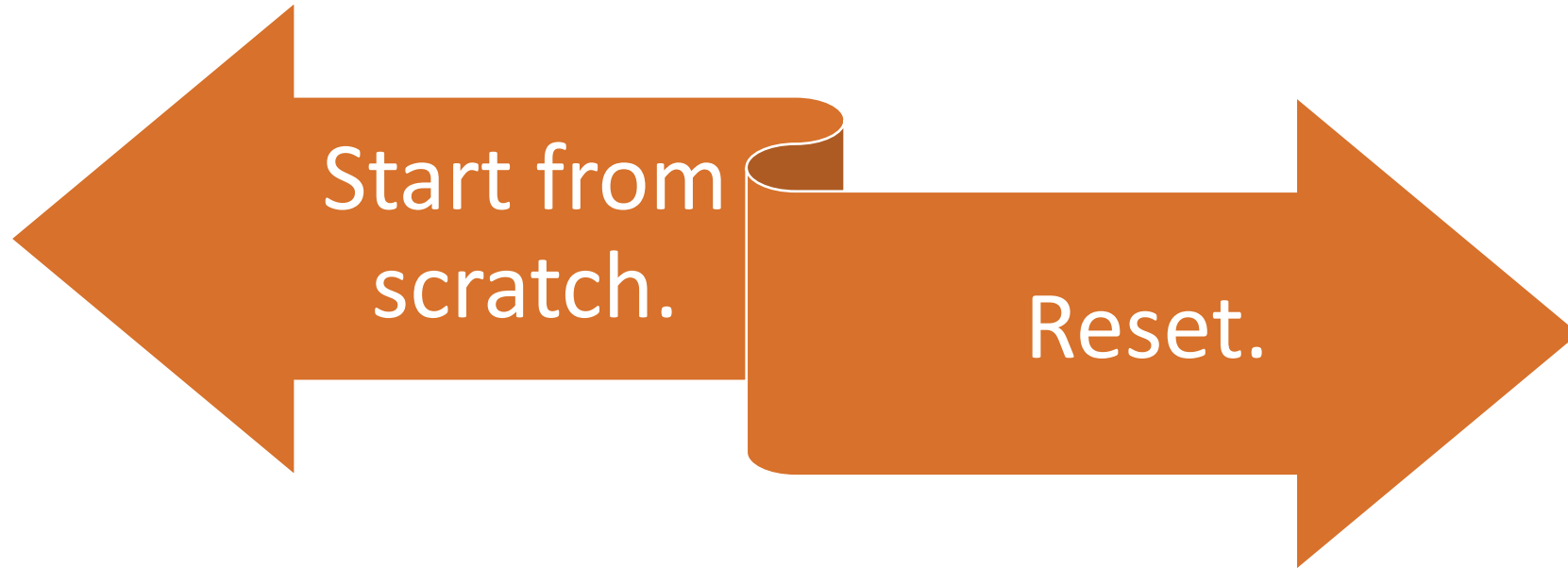


Pause.

- Give yourself a minute to pat yourself on the back.
 - Share two professional accomplishments in the last two years!



How do I start?

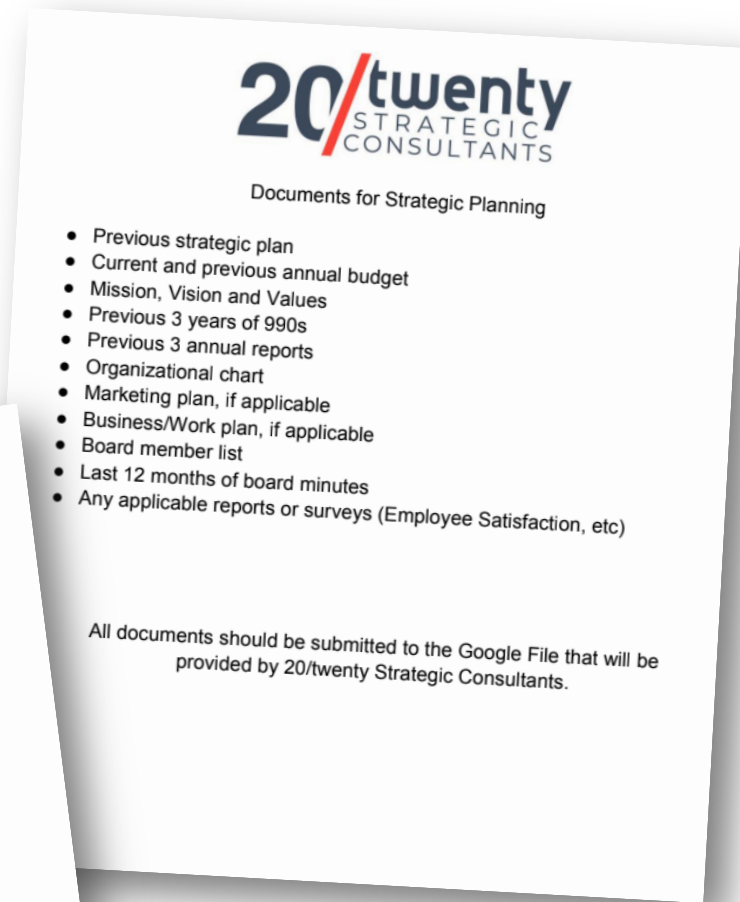
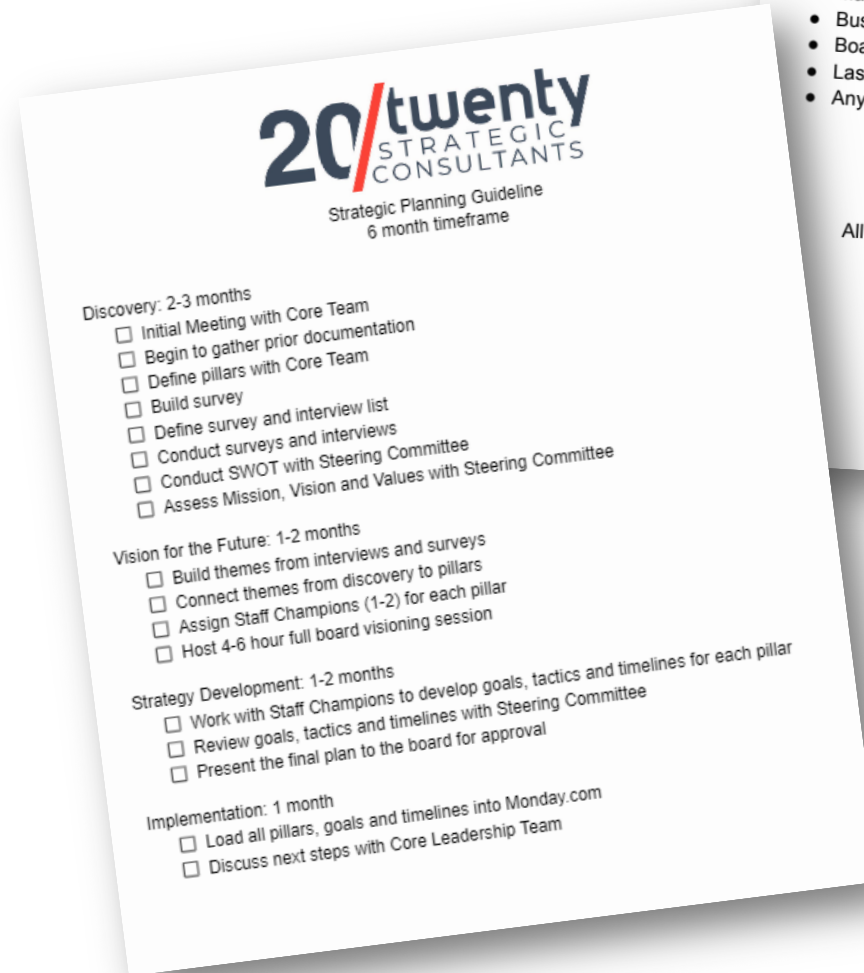


- Substantial mission shift
- New senior leadership
- Current plan is more than 4 years old

- Need to re-focus
- No new programs/services
- Current plan is being actively used

How do I start?

- Get Board buy-in
- Decide on a timeline
- Begin compiling previous documentation



What should the process look like?

The Strategic Planning Process

1. Discovery – create a deep shared understanding of the current state.



2. Vision for the Future – Align stakeholders on a bold and achievable vision.



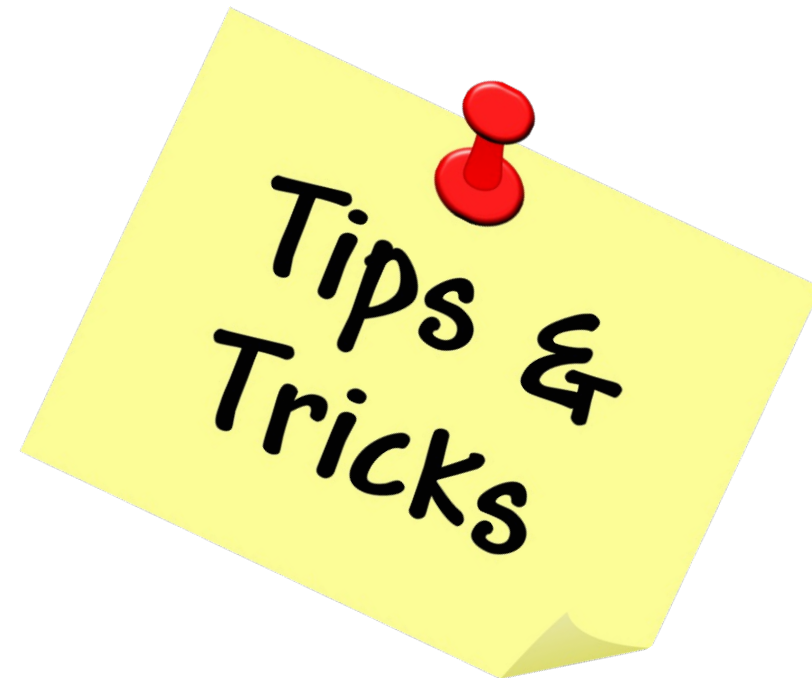
3. Strategy Development – Deliver the strategic blueprint.



4. Implementation – Operationalize the plan so that the team can put it into action.

Tips and tricks for implementation

- One, and no more than two, champions for each part of the plan.
- Meet regularly to discuss. **Cadence matters.**
- Break your goals into tactics – and then break them down again.
 - You will get busy doing other things
- Invest in a software to assist with management
- Invite mid-level management to the table.
- Don't get complicated!



Questions

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Answers

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