

How to ...

assess the effectiveness of your strategic plan?

Here are three top tips to help you assess the effectiveness of your strategic plan and some examples are also provided. Version 1

I create these 'how to ...' sheets for clients when I am working on specific projects. They are shared as a 'snapshot' of good practice and are not intended to be a definitive guide. I update them when a project arises, so watch out for new versions and for 'How to ...' sheets on other topics. Feedback is always welcome, Sally.



TIP ONE – THE TEST OF A GREAT STRATEGIC PLAN

- ✓ It looks to the future and responds to external trends, opportunities and threats
- ✓ It is strongly audience / customer / community/ visitors (pick your preferred word) focused
- ✓ It identifies the critical areas to be successful – see Tips Two and Three
- ✓ Leading on from that, it includes goals and objectives that are actionable and measurable
- ✓ It is shared, owned and activated across the organisation
- ✓ It differentiates your organisation from others
- ✓ It adds value to audiences and stakeholders
- ✓ It has been developed with input from others, including staff and stakeholders
- ✓ Finally, it is inspirational, on brand and succinct. Distilling it to a 'strategy on a page' is great for communications.

A good starting point is to review your existing strategic plan against these points.



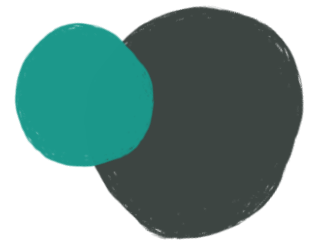
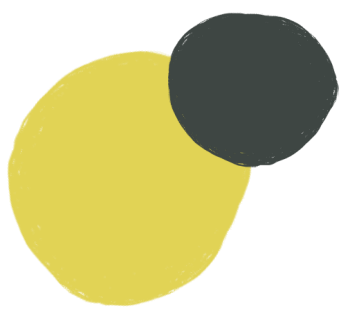
TIP TWO – MUST WIN BATTLES

Any strategic planning process involves identifying your “must win battles” or key strategic initiatives, as well as the trade-offs, meaning the things you will stop doing / do less of / do differently. This can be challenging, especially when one considers stakeholders’ expectations. Creating a framework for assessing what you should and shouldn’t do can help this process.



TIP THREE – THINK ‘THEMES’

Your priorities should ideally fit into themes. This gives good structure to your strategic plan and helps bring focus. Three or four themes are recommended as a maximum (depending on the size of your organisation). For example, ‘customer experience’, ‘business sustainability’ and ‘thriving organisation’.



A few examples from the arts and culture sector

Arts Access Aotearoa Putanga Toi ki Aotearoa: www.artsaccess.org.nz/about%20us?src=nav

The incorporation of Te Reo Māori in the values is good to see and there are three clear strategic goals – access, leadership and influence.

Royal New Zealand Ballet Annual Plan: www.rnzb.org.nz/wp-content/uploads/2018/05/RNZB-Annual-Plan-2018-009.pdf

The structure is very clear, it is on brand and it has clear goals:

- Engage audiences
- Extend our talent
- Enhance our capability

Foundation North strategic plan: <https://do6qmrbufqcd2.cloudfront.net/1002/fn-strategic-plan-web-sprds-2018-%C6%92.pdf>

I like this as it endeavours to capture the plan on a few pages and it describes ‘the difference we want to make’. The priorities are clear.

National Museum of Australia: www.nma.gov.au/about/corporate/plans-policies/strategic-plan

A good example of focus through ‘key streams’ (albeit five – one too many 😊):

- Collections for the 21st Century
- Programme directions
- Digital futures
- Growing our business
- Brand recognition