

APICS
Volunteer Leadership Workshop
Toronto - 2009

Plan Strategically and
Execute Tactically

Dave Johnson, CPIM
Phoenix Chapter

Presentation Objectives

- Present an overview of the planning process
- Present a workable plan format
- Provide a methodology for developing a plan
- Understand the communication necessary for developing the plan



Some Opening Philosophy

You and the chapter BOD have a vision of where the chapter needs to go; a vision which hopefully is shared by the members.

The strategic plan is the vehicle to make that vision into a REALITY!

But only if the plan is carefully crafted, wisely implemented, and the results accurately and honestly measured!

Strategic vs. Tactical

Strategic - The “What”

Longer horizon – 3 to 5 years, the general direction
The growth and management goals for the chapter
Aligned with the association Plan

Tactical - The “How”

Short horizon - current year, the specific direction
Actions to meet current challenges
Lets you respond to targets of opportunity

Most chapter plans are a blend of strategic and tactical.

Strategic Plan Schematic



Getting Started

- Decide what the chapter really wants and if a plan is needed
- Determine who the players will be in developing the plan - the “team”
- Determine what you have in hand already and what must be developed
- Develop enthusiasm for the effort



Resources Available

- Strategic Planning Chapter Leadership Handbook (#01029)
- Best Practices CD-ROM (#01089)
- Association/district vision, mission, goals, and plans
- Your association/district staff
- Chapters in and outside your district
- Common sense



Pieces of the Puzzle

- Chapter Vision
- Chapter Mission
- Chapter Goals
- SWOT Analysis Longer Range/4-5 Years

- Functional Goals Shorter Range/Annual Review
- Functional Objectives
- Actions Required

Long Range Aspects

- Vision, Mission, Goals, and SWOT
- General statements of chapter principles, focus, and direction
- Need consensus view from the “team”
- Don’t change often, only if conditions or basic direction changes
- Review annually as part of the process

Points to Ponder

- Vision - Our view of our universe
- Mission - What we'll do to achieve the vision
- Goals - How we'll accomplish our piece of the mission
- Objectives - Intermediate steps we must take to reach our goals
- SWOT - Our look at the world around us

The Planning Process

- Provide “prework” for the “team”
- Plan on 2 or 3 meetings and keep meetings to 3 hours or less
- Every idea is a good one; let “team” members be heard
- Beware of the chapter “oracle”
- Use a facilitator, if you know or have a good one, to keep things on track



Strategic Plan Format

1. Introduction
2. Definitions
3. Chapter Vision
4. Chapter Mission
5. Chapter Goals
6. Functional Goals & Objectives
7. Performance Measurement

Authentication



Cautions



- Don't have someone develop a detailed "straw man" ahead of time
- Don't study the issue to death
- Keep wordsmithing to a minimum
- Don't be too granular

The goal is focus and direction for the chapter - not a Pulitzer Prize!

Short-Term Aspects

- Functional area goals, objectives, and actions
- All designed to support chapter goals
- Use of assumptions and support requirements
- Must be measurable and doable
- Reviewed/rewritten annually - reflect the incumbent

Functional Area Format

Goal #1 State in measurable terms
(Supports Chapter Goal # X)
Assumptions (if required)
Support Requirements (if required)
Obj A State in measurable terms
Obj B State in measurable terms
Thru Obj "N" - however many it takes

And so on thru Goal #N

Performance Measurement

Goals and objectives must be:

- Measurable and attainable
- Quantifiable - by “X” date, every month, increase by “X” %, etc.
- Not so granular that measurement becomes the “thing” and not performance
- CMS/C-BAR becomes a slam dunk!

Action List Example

MS/CBA	Area Supported	Date assigned	Assigned to	Tactical Actions	Comments	Completion Date (since last BOD meeting)
	Executive	#####	All	Update Strategic Plan actions in Google Docs by end of the week	Due on 6/15/2009	
	Marketing	#####	All	Review and update website pages relating to the functional area and submit changes to the ASO.		
	Marketing	#####	All	Submit newsletter articles for July/Aug edition by 6/15/2009	Post in Google Docs and update Tracker	
	Administration	#####	ASO J Lewis	Submit Mar BOD meeting minutes to Administration for review	Need BOD approval	5/24/2009
	Administration	#####	ASO J Lewis	Create DL for Board & Directors, and communicate out to all how to	Created BOD@apicsphoenix.org email	5/30/2009
	Administrative	#####	ASO J Lewis	Document CBA-supported actions contained in the Misc Strategic	Ongoing - A Strategic Planning sheet will be	

CMS/CBAR Tracking

*CBAR	Description	Due	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Total
Goal #1	Represent the Chapter, internally and externally, in a professional manner (Supports Chapter Goal #7)														
Obj A	Attend at least six (6) PDM meetings during the 2008-2009 Chapter year to network with members, potential members, and guests.	Monthly		1	1	1	2		2	1	2	1	1	2	14
Obj B	Attend at least six (6) BOD meetings during the 2008-2009 Chapter year.	Monthly	1	1	1	1		2	2	1	2	2	1	2	16
CMS-E5	Obj C Attend a minimum of one (1) District Meeting during the 2008-2009 Chapter year.	Quarterly		1								1			2
Obj D	Submit at least two (2) newsletter articles for inclusion in the Chapter Newsletter during the 2008-2009 Chapter year.	Monthly													0
Obj E	Represent the Chapter and APICS at related professional association meetings, as invited.		DWJ -Aug 08 - Attended SW Dist Mtg & PDM; Sep 08 Joint PDM w/ISM												
Obj F	Maintain a functional area calendar of events on the website (special events for affiliate organizations and deadlines).	Monthly													

Other Considerations

- The plan affects other chapter documentation
- Keep conflicts out of the process
- Chapter bylaws
- Chapter policies and procedures/SOP
- Monthly meeting minutes



Is This Easy??

- No, but it is not impossible and it does take work and dedication
- First iteration takes time and effort
- Subsequent iterations are not as painful
- Takes a “team” effort and ownership by the functional areas to succeed
- But, it does cut down on the “I didn’t know that” and finger-pointing

What We Set Out to Do

- Present an overview of the planning process
- Present a workable plan format
- Provide a methodology for developing a plan
- Understand the communication necessary for developing the plan





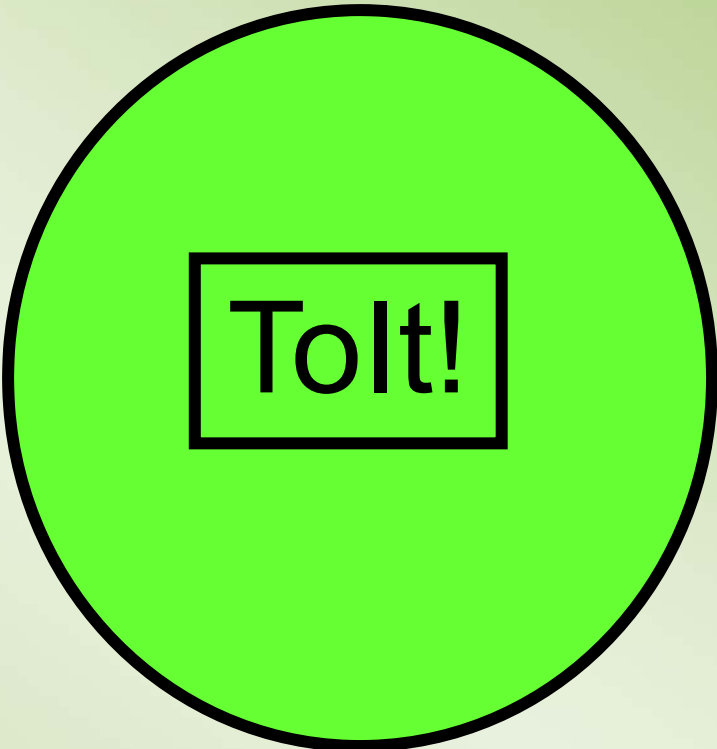
Thank You for Your Kind Attention

If you have any questions,
please don't hesitate to give me a

Call: (480) 345-2840

E-Mail: usaret2@cox.net

Dave Johnson



□ What's this? This is a Round Tolt!
Strategic planning is important -
Never let it be said that your chapter
didn't get around to it!

SO - GO TO IT!!



APICS
Volunteer Leadership Workshop
Toronto - 2009

Plan Strategically and
Execute Tactically

Dave Johnson, CPIM
Phoenix Chapter