



All Strategy is Change

You Better Measure It

Defining & Executing Strategy Using Analytics

WIPFLI

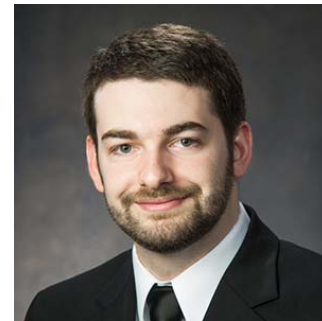
The Wipfli team



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Agenda

01

Defining your
strategic plan

02

Managing changes
driven by your
strategic plan

03

Measuring the
success of your
strategic plan

Defining your strategic plan

Traditional strategic planning

Shifting in a COVID-19 world

- Critical strategies
- Scenario planning

Action planning

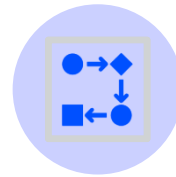
- Look for measures
- Qualitative/quantitative

Real world examples

Why strategy? Why now?



Strategies are longer-range themes and priorities



These are broken down into shorter-term goals and action plans



Tactical planning is often held at the action planning level



Plans run from 3 to 5 years, with 3 years being the most common length of time

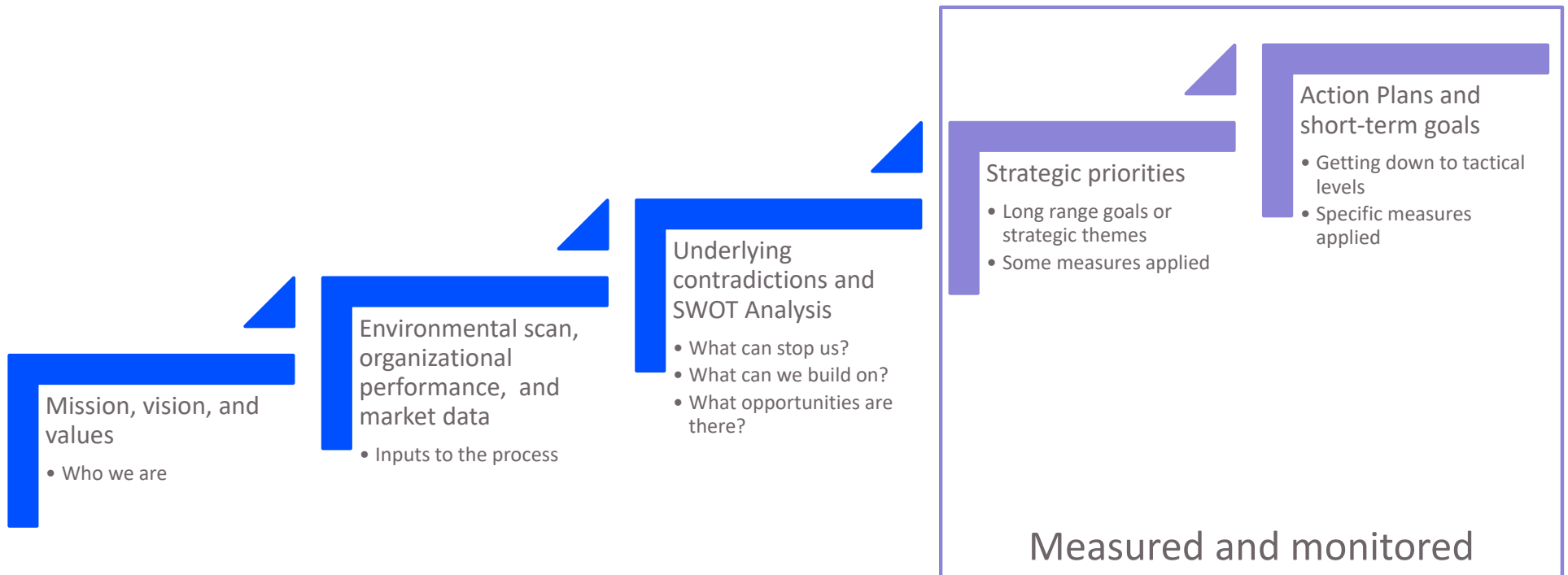


They are often less measurable

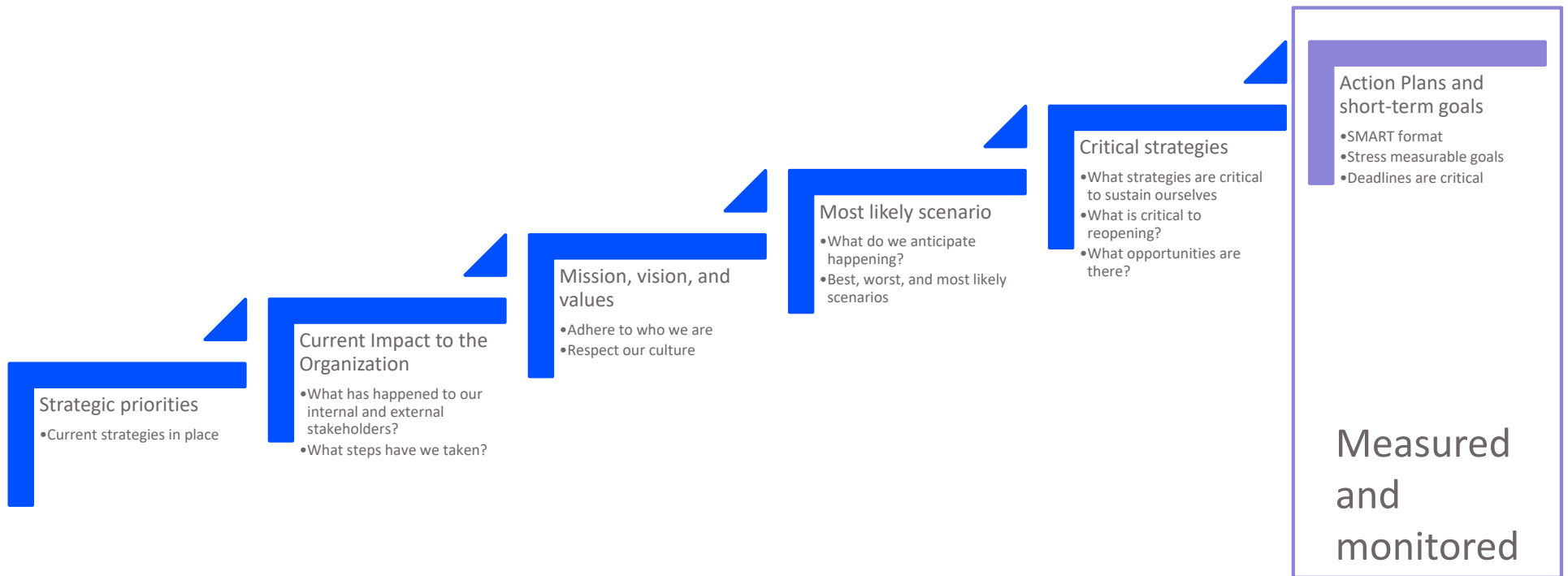


Emerging from the COVID-19 crisis will require both strategic and tactical thinking

What traditional strategic planning looks like



Shifting strategy to address COVID-19



How we are action planning today – NOW, WHERE, and HOW

Begin with the current reality – the NOW

- Review the current impact to the organization's stakeholders
- Consider how they apply to this specific critical strategy

Confirm the success indicators – the WHERE

- Review the mission, vision & values, and the most likely scenario consensus regarding the impact of COVID-19
- What will be different in 1 year if we are successful in this critical strategy?
- What will be different in 90 days?

Define the accomplishments, the first part of HOW

- What do you need to accomplish in the next 12 months?
- What needs to be accomplished in the first 90 days?

Build the action plans – the HOW is complete

- Develop the accomplishments into action plans
- Identify the first 90 day action plans and designate owners
- Conduct detailed implementation planning for the first 90-day plans using focused participant groups

An example of turning a strategy into action

Critical strategy:	Improve employee retention following the COVID-19 crisis	
#1 Most likely scenario consensus and Current reality notes	#3 90-day / Year 1 Accomplishments	#2 Success indicators
<p>Most likely scenario: There may be increased absenteeism and turnover following the COVID-19 crisis. Employees may not want to return to work. New employee onboarding currently lacks a clear process and will have to be even better with remote components required after COVID-19 crisis.</p> <p>Current reality notes: We are not known as a fun place to work.</p> <p>People are worried they won't see their co-workers.</p> <p>We have known for sometime that it takes too long to on-board staff, based on feedback and a process study that was conducted.</p>	<p>Formed a culture committee and held quarterly meetings.</p> <p>Conducted a culture survey of all staff to provide input on the effects of COVID-19 (90)</p> <p>Reviewed and updated the new employee onboarding process to incorporate virtual onboarding and address gaps in the process. Time reduced to onboard a staff member by 50% over pre-COVID-19 measurements (90)</p> <p>Held social events with the staff, both in person and virtually, building culture and connections.</p>	<p>Decreased time to onboard staff by 50%</p> <p>Decreased turnover across the organization, 10% reduction overall</p> <p>Increased involvement in social activities as measured by increasing numbers of staff in attendance at these activities</p>

Writing an action plan – example 1

- 90-Day accomplishment:
 - ▶ Conducted a culture survey of all staff to provide input on the effects of COVID-19 on ABC Organization culture
- Action plan – 2 Composition options:
 - ▶ **ABC Culture Assessment:** By June 15, 2020 ABC will select and administer an assessment of organizational culture to all ABC staff and volunteers, with results in use by July 1, 2020.
 - **Goal Owner:** Director of Talent Management
 - ▶ **ABC Culture Assessment:** Organizational culture assessment to all ABC staff and volunteers by 06/15/2020, in use 07/01/2020. Owner: Director of Talent Management

Writing an action plan – example 2

- 90-Day accomplishment:
 - ▶ Reviewed and updated the new employee onboarding process to incorporate virtual onboarding and address gaps in the process. Time reduced to onboard a staff member by 50% over pre-COVID-19 measurements

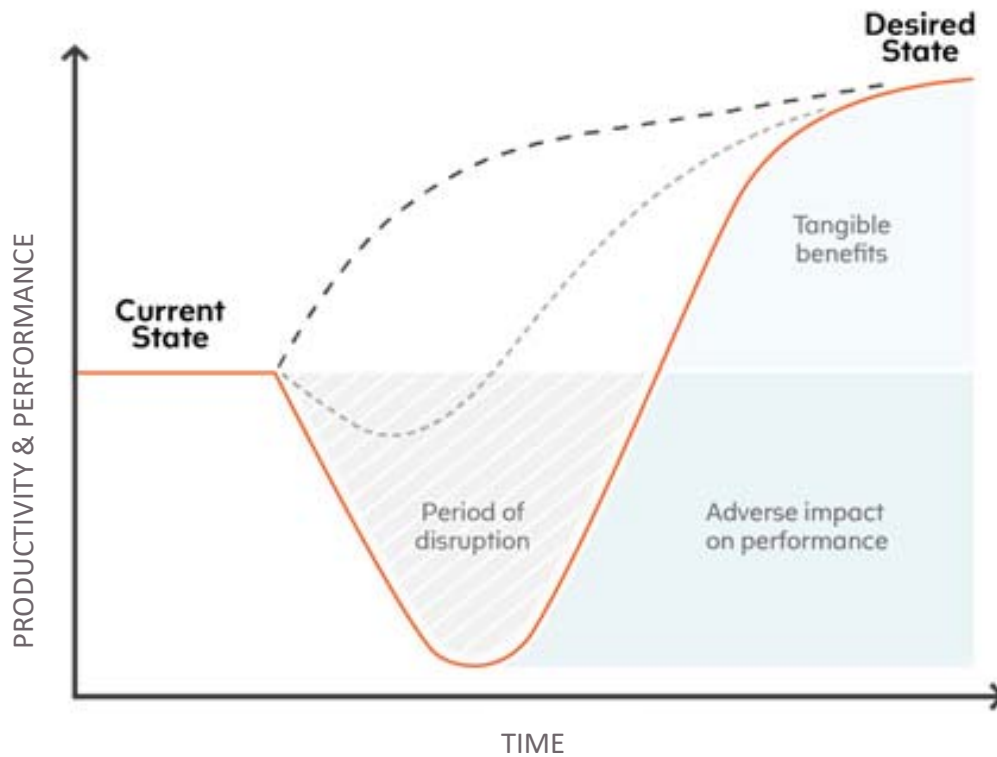
- Action plan:
 - ▶ **ABC Onboarding process improvement:** Onboarding process improvements will be completed by June 15, 2020, with a 50% decrease in the time to onboard a new or returning employee. Goal Owner: Director of Talent Management

Managing changes driven by your strategic plan

- Period of Disruption
- The Emotional Factor
- The Value of Communication and Visibility

Period of disruption

The J-Curve



Legend

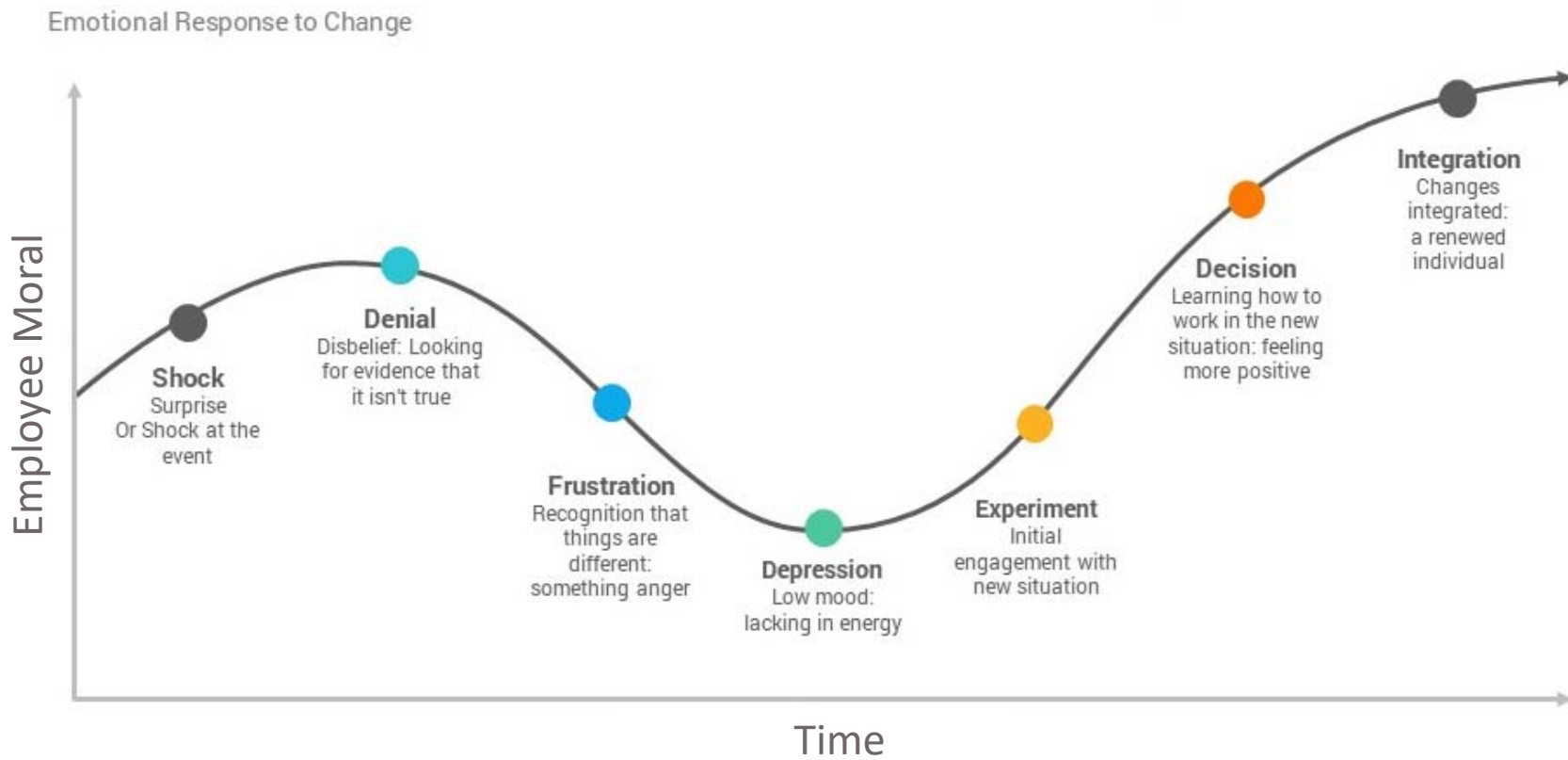
What stakeholders expect

What stakeholders can expect with good
Organizational Change Management Activities
like:

- Targeted communications
- Focused education and training
- Visibility

What actually happens in most cases

The people factor



The value of communication and visibility

Moving the needle towards desired state

There is no such thing as “too much communication” when you are implementing change

Invest time (and money when applicable) for training to maximize user adoption

Transparency is key

Measuring success of your strategic plan

- Goals must be measurable
- Deadlines or touchpoints for accountability
- Combination of leading and lagging indicators

Action Plans and short-term goals

- SMART format
- Stress measurable goals
- Deadlines are critical

Measured
and
monitored

Leading vs lagging indicators

Leading

- Input oriented
- Harder to measure
- Easily Influenced

Lagging

- Output oriented
- Easier to measure
- Harder to influence

Measurement vs success

- Measuring data is just a tool, like any tool it can be used improperly
- Measuring data for measuring sake is the same as not measuring it at all
- Defining your strategy and then measuring success criteria is key to reaching the goal

Demo of strategic dashboard