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& ASSOCIATES

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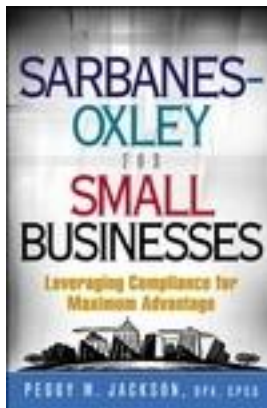
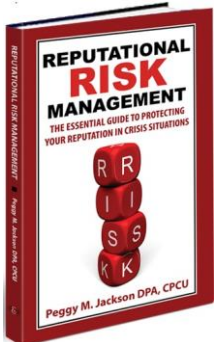
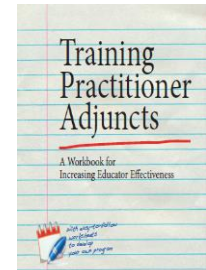
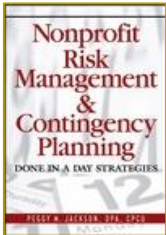
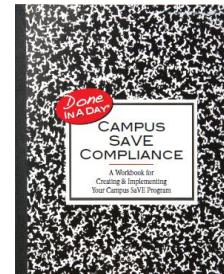
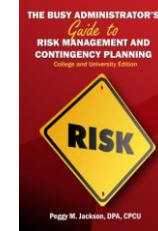
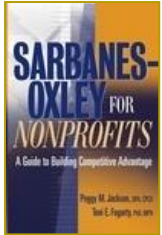
ACCELERATED STRATEGIC PLANNING

Peg Jackson, DPA, CPCU

**Peg Jackson & Associates
San Francisco, CA**



Peg Jackson & Associates is honored to have been named the 2014 Culver City Chamber of Commerce Member of the Year



LEARNING AGENDA

- **How to design and execute an effective Strategic Plan**
- **The important role that the Horizon Initiative and the Eight Influences identified plan in helping to shape an effective Strategic Plan.**
- **How to prepare a strategic plan for your Chamber in approximately four (4) weeks.**

EFFECTIVE STRATEGIC PLANNING

Unless your Chamber's strategic plan establishes a vision for its future and is meaningful to those in your organization, it will end up gathering dust on the shelf!

That never needs to happen!

Strategic planning is an exciting endeavor that can energize and revitalize your Chamber.

Why Chambers Waste \$\$ Writing Ineffective Strategic Plans

- The Plan does not clearly articulate goals and describe the expected changes necessary to bring about lasting change.
- The Chamber has no idea about:
 - What the structure of the strategic plan should look like, or
 - How to go about articulating the vision for the organization
 - Creating a roadmap to get there

STRATEGIC PLANNING & SOX BEST PRACTICES

- **Leveraging the Strategic Planning Process to improve SOX best practices**
 - **Whistleblower compliance**
 - **Document preservation**
 - **Financial Internal controls including segregation of duties**
 - **Conflict of Interest Policy**
 - **Code of Ethics**
 - **Audit Committee**
 - **Transparency at all levels of management including governance.**

EFFECTIVE STRATEGIC PLANNING

- **NEVER** engages in magical thinking
- **Always** takes **IDENTIFIES** the resources necessary to carry out the plan
- **Always** has strategies and tactics to facilitate achievement of goals
- **Always** has **deliverables** assigned
- **Individuals are held responsible** for completion of specified elements of the plan.

Private Sector Firms and Strategic Planning

- Private sector firms understand that the Plan is a strategic business plan and fully intend for the Plan to result in important growth results.
- Private sector firms never create a Strategic Plan without fully understanding where the sources of capital are, the probability of obtaining first tier funding, and having a back-up plan.



EFFECTIVE STRATEGIC PLANNING

- **Starts with an effective Strategic Planning Committee – This team needs to be the stars of the chamber board!**
- **Focus on Action!**

ELEMENTS OF A STRATEGIC PLAN

- **Organization Profile including the History of the Chamber** (*Needs to be very brief – only salient points*)
- **Mission, Goals and Objectives of the Chamber**
- **Summary of Relevant Facts and Statistics**
- **Summary of Results from [the last]Strategic Plan of 19XX or 2XXX**

ELEMENTS OF A STRATEGIC PLAN

- **SWOT Analysis – Strengths, Weaknesses, Opportunities and “Threats” – which should really be seen as “gaps.”**

ELEMENTS OF A STRATEGIC PLAN

- *Environmental Scan*
 - **Comparable programs in other Chamber organizations**
 - **How the trends in the Chamber world particularly as these relate to the Eight Influences should influence the structure and goals of the Strategic Plan.**

EIGHT INFLUENCES & STRATEGIC PLANNING

- ***The Nature of Belonging and Gathering*** – Identify membership value in terms that rely less upon attendance and participation.
- ***Communications and Technology*** – Consider adopting an “analyze and filter” culture – keep your communications model fresh.
- ***Scarcity and Abundance*** – Chambers need to be effective problem solvers.

EIGHT INFLUENCES & STRATEGIC PLANNING

- ***Global Impacts-*** In 10 years your Chamber will be expected to provide assistance to members in dealing with international affairs and global trade.
- ***Population Shift*** – Embrace methods to promote membership diversity – particularly as this relates to generational issues.
- ***Political and Social Fragmentation*** – The Chamber needs to remain the “sane middle.” Approach crises from a compromise solution.

EIGHT INFLUENCES & STRATEGIC PLANNING

- ***Resource Alignment*** – Finding ways to secure more funding targeted to support the mission and vision of the Chamber.
- ***Catalytic Leadership*** – *Define the Chamber's vision in terms of what the Chamber will be*, rather than what it will do. The Chamber can be defined as a change agent for the community.



EIGHT INFLUENCES & STRATEGIC PLANNING

Choose 2 or 3 of the influences that are most relevant to the strategic issues that your Chamber needs to address in the Strategic Plan.

DEVELOPING STRATEGIC GOALS

- **Where do we want to be in 2 years?**
 - **What opportunities does the Chamber have to improve its response to the organizational mission?**
 - **What opportunities exist to grow the Chamber?**
 - **What resources are required?**

EXECUTING THE STRATEGIC PLAN

- **Recommendations for Priority Action**
 - Key pieces of the plan are segmented into goals, objectives and strategies for the next 2-3 years.
 - The recommendations will also include clear descriptions of the resources needed to move to the next step.
 - Prepare a detailed timeline for completion of the goals, objectives and strategies.
 - Assign deliverables and hold people accountable.



LAUNCHING THE STRATEGIC PLAN

- **How to present, promote and leverage the Strategic Plan to the Chamber's members and stakeholders**

TELL THE WORLD!



SUMMARY

Strategic Planning is an opportunity for your Chamber to put important systems into place. An effective Plan will serve to feature priority action in selected areas that will serve to strengthen the Chamber's role in your community.